



*Government of the District of Columbia*  
**Office of Public Education Facilities Modernization**

## **TRANSITION PLAN**

### *Office of Public Education Facilities Modernization*

*December 3, 2007*

*Allen Y. Lew*  
*Executive Director*

**Transition Plan**  
***Office of Public Education Facilities Modernization***

**TABLE OF CONTENTS**

- I. Executive Summary**
- II. FY 2008 Activities and Management Reforms**
- III. Current State of DCPS Office of Facilities Management**
  - a. Overview of Current OFM Organization
- IV. External Models**
  - a. Comparable Models
  - b. Benchmarking Research
- V. Transition Strategy**
  - a. Employees
  - b. Financial Resources and Management
  - c. Communications Plan
  - d. Implementation Timetable
- VI. OPEFM Transitional Structure**
  - a. Organizational Chart
  - b. Budget
  - c. Personnel Rules
  - d. Procurement Rules
- VII. FY 2008 Work Plan**
  - a. Stabilization Program
  - b. Modernization Projects
  - c. Master Facilities Plan

## **I. EXECUTIVE SUMMARY**

This transition plan is intended to outline the manner in which the Office of Public Education Facilities Modernization (“School Modernization”) will assume control over the functions, assets and personnel currently administered by the Office of Facilities Management (“OFM”) within the District of Columbia Public Schools (“DCPS”). School Modernization was established by the *Public Education Reform Amendment Act of 2007* (the “Education Reform Act”) and charged with implementing a long term capital modernization program aimed at remaking the school facilities operated by DCPS. The capital modernization program is part of a larger effort to remake the District’s public school system and ensure that the District’s children are provided with high performing schools and unique educational resources.

Subsequent to the adoption of the Education Reform Act, the Council for the District of Columbia adopted the *School Modernization Use of Funds Requirements Emergency Amendment Act of 2007* (the “OFM Transfer Act”) pursuant to which it transferred, subject to certain regulatory requirements, the functions, assets and personnel of the existing Office of Facilities Management into School Modernization. Among other things, the OFM Transfer Act made School Modernization responsible for routine maintenance of schools facilities – this function had previously been assigned to DCPS by the Education Reform Act. The OFM Transfer Act also required School Modernization to develop a transition plan that summarizes the manner in which it will organize itself and assume the functions, assets and personnel of OFM. This is that plan.

### **Background**

Both the Education Reform Act and the OFM Transfer Act can only be understood in the context of the current situation plaguing District students, teachers and staff. The school facilities operated by DCPS are poorly maintained, have suffered from decades of inadequate maintenance, have malfunctioning building systems such as inoperable heating, plumbing systems that do not work, and leaking roofs. In addition, many of the schools were designed more than 40 years ago and lack building systems such as libraries, cafeterias, computer access, etc. that are consistent with modern standards. Finally, the system has an excess of square footage distributed among too many buildings as a result of the historic reality of “separate but equal” facilities in a system that was racially segregated up until just a few decades ago. Over the last few years, the local press has annually reported stories of schools failing to open due to unaddressed fire or health code violations, or closing in the winter months as a result of broken boilers. In short, DCPS facilities have become a detriment to learning, not to mention the health and safety of students, teachers, and administrators.

### **Vision and Mission**

Put simply, the time has come to fix the District’s ailing public school system. Earlier this year, the Mayor, the Council and the Congress took forceful action that revised the organizational structure of the District’s schools. Authority for and the oversight of the schools was transferred from the Board of Education to the Mayor; and, School Modernization was created and charged with providing modern school facilities that will

support and enhance the learning environment. Based on the legislative mandate and the situation in the schools, School Modernization has established the following mission:

***To utilize the best management practices of both the public and private sectors to provide the children of the District of Columbia with safe, healthy, and technologically current environments for learning.***

In order to implement its mission, School Modernization has two tasks: one organizational and one physical. In a traditional model, School Modernization would first put in place the organizational structure and resources necessary to accomplish its tasks and then would undertake the physical transformation of the schools. However, both the Mayor and School Modernization's Executive Director believe the situation at hand is too dire to move in such a manner. The conditions in the schools require immediate, forceful action. Neither the students nor the schools have the luxury of waiting for School Modernization to undertake organizational studies.

As such, this transition plan contemplates that both of these tasks will occur simultaneously. Students and teachers should not have to wait 10 to 15 years for livable, usable schools. Toward that end, School Modernization has established a stabilization initiative that is aimed at making all schools safe and livable in time for the 2008/2009 school year. This effort will require expenditures of approximately \$120 million. In addition, approximately 20 capital projects having an aggregate construction value of \$640 million are or will be underway during Fiscal Year 2008. These projects must move forward.

At the same time these project are moving forward, School Modernization must establish a new organizational structure. In developing this new structure, School Modernization will strive to achieve the following goals:

- ***Commitment to Excellence*** – The children and residents of the District deserve the highest quality schools possible. Toward this end, School Modernization intends to raise the bar for its staff, consultants and contractors. Mediocrity is not enough. School Modernization intends to engage the most talented architects and builders to design and construct a new level of excellence in District school buildings. Current OFM staff will be challenged to meet this commitment. Those that meet School Modernization's expectations will be retained and provided with the necessary training and resources to perform at a higher level of expectation.
- ***Emphasis on Maintenance*** – School Modernization was originally tasked with overseeing the modernization of school facilities. This, however, is not enough. Both the existing and new buildings must be properly maintained. Many of the problems facing the school buildings are the result of their age. Equally, many – perhaps more – are the result of poor maintenance. For example, our review has identified many schools where new boilers were installed 3 or 4 years ago. These boilers are now inoperable due to poor maintenance and will need to be replaced. Proper maintenance budgets must be adopted and sufficient staff devoted to these tasks.

- ***Building Quality*** – The school buildings must be modernized to repair years of neglect and to ensure that each building provides state of the art amenities. The facilities should also reflect the District’s commitment to education and environmental sustainability. The architecture should reflect the prominence and importance of education and the monumental grandeur of the nation’s Capital.

### **Transition Plan**

This transition plan describes the manner in which School Modernization intends to assume responsibility for the functions, assets and personnel of OFM. That process will proceed as follows:

- ***Phase 1*** – School Modernization has engaged Thompson, Cobb, Bazilio & Associates, PC (“TCBA”) to assess the current financial operations and information technology (IT) infrastructure of OFM. The purpose of this study is to identify weaknesses in OFM’s management structure and to assemble a list of all of OFM’s contracts, personnel and assets. This study is well underway and a preliminary list of TCBA’s findings was delivered to School Modernization on November 15, 2007. Many of the insights gleaned from that study have been incorporated into this transition plan. A detailed summary of TCBA’s findings is appended to this transition plan. In summary though, TCBA found that most of OFM’s management and business practices lacked appropriate controls and that inadequate management resources were available to OFM.
- ***Phase 2*** – School Modernization intends to engage a management consulting firm to undertake a best practices study. Proposed procurement regulations have already been prepared by School Modernization and are currently before the Council for review and approval. Personnel regulations have also been drafted and will shortly be submitted to the Council for review. The management consultant will be required to review best practices and to help put in place the infrastructure necessary to implement these regulations.

It should also be noted that School Modernization has already undertaken a preliminary review of organizational and fiscal structures of Facilities Management entities currently serving K-12 school systems in various states throughout the Eastern region of the country. This benchmarking effort captured organizational and fiscal data of Facilities Management organizations in the states of Connecticut, New York, Pennsylvania, Delaware, Maryland, and Virginia. This data and our observations are set forth in this transition plan.

Although DCPS and the District of Columbia are unique in many ways, there is no doubt that useful lessons may be derived from study of the facilities management and modernization arms of nearby school systems and those in areas with similar demographic and socioeconomic characteristics. Useful points of comparison therefore include both the District’s nearby neighbors, as well as other major urban public school systems nationwide. The management consultant will be required to undertake a review of the management practices other school districts.

Examples under study include:

➤ ***Regional Neighbors***

- Prince George’s County
- Montgomery County
- Fairfax County
- Baltimore County
- Baltimore City

➤ ***National Models***

- New York
- Philadelphia
- Chicago
- Los Angeles

- ***Phase 3*** – The third phase of the transition plan will begin concurrently with Phase 2 but will expand beyond the end of Phase 2. During this phase, School Modernization will realign OFM’s organizational structure, personnel and budgets to reflect School Modernization’s overall mission and goals. Each of these three areas is discussed briefly below and in more detail in the remainder of this transition plan.

**a. Organizational Structure**

The management review conducted by TCBA (discussed above) revealed many problems with OFM’s organizational structure. These issues will need to be addressed. A new information technology system will need to be put in place as well. Under the current management structure, OFM did not have its own legal, procurement, personnel or financial management. All of these functions were performed by separate divisions within DCPS that were not directly accountable to or managed by OFM. This management structure placed OFM at a critical disadvantage as it lacked the ability to directly manage these critical business functions. Without direct authority over its personnel, budgets or procurements, OFM managers lacked the tools to properly manage the functions assigned to them. The *Education Reform Act* has, to a large degree, provided School Modernization with control over many of these functions.

In order to address these issues, procurement, personnel and budget functions will report directly to the Executive Director and will provide the necessary support to all of School Modernization’s operations.

**b. Personnel Realignment**

School Modernization will conduct a review of OFM’s existing personnel and develop a new organizational structure. Existing OFM personnel will be evaluated to determine whether they have the necessary skills and commitment to excellence to be part of the new team. At present, School Modernization envisions that its operations will be divided into three divisions: a Construction Division, a Facilities Operations and Maintenance Division and a Business Operations Division. Because of the

interim nature of the stabilization initiative as well as its size, the stabilization effort will be managed by the construction division.

*Construction Division* - Currently, OFM has approximately 50 staff assigned to manage the modernization effort. They will be evaluated to determine how they can best be deployed. It is envisioned, however, that most modernization projects will be overseen and managed by program management companies hired from the private sector.

*Facilities Operations and Maintenance Division* - Currently, OFM has approximately 267 craftsmen and building engineers. A preliminary assessment suggests that many of these individuals lack either the resources or training to effectively perform their functions. Many of the routine maintenance and operation tasks are best performed by in-house personnel such as boiler operations, routine electrical and plumbing repairs, etc. School Modernization intends to develop a strong cadre of in-house staff to perform those functions. Current OFM employees will be evaluated and assigned to appropriate positions within the Facilities Operations and Maintenance Division. They will be properly trained and provided with the necessary resources to accomplish these tasks.

*Business Operations Division* - The critical business functions that facilitate an organization's successful operation were not contained within OFM's organizational structure or coordinated by its management team. School Modernization will establish a Business Operations Division to coordinate our own legal, procurement, personnel and financial management systems. Current OFM employees assigned to functions related to procurement, budget, customer service and accountability will be considered for reassignment to this division.

**c. Budget Realignment**

Over the next 6 months, OPEFM will undertake a review of the proposed Master Facilities Plan. During this process, School Modernization and its consultants plan to evaluate the reasonableness and adequacy of the capital budgets. Equally important, School Modernization intends to develop a new maintenance budget. The current maintenance budgets are inadequate to properly maintain the DCPS school buildings and facilities.

The remainder of this transition plan is divided into five sections. Section II describes the key tasks that must be completed in FY 2008 as well as certain management reforms that will be accomplished during that timeframe. Section III describes the current condition of OFM. Section IV provides an overview of how similar organizations have been structured. Section V provides more detail on the transition plan. Section VI provides an overview of the proposed organization of School Modernization. Please note that the structure proposed in Section VI is preliminary in nature and will necessarily evolve as more information is gained by OPEFM.

## II. FY 2008 ACTIVITIES AND MANAGEMENT REFORMS

### Management Reforms

During FY 2008, School Modernization intends to implement a number of key management reforms. These include the following: (i) hire key management staff; (ii) complete the personnel realignment; (iii) complete the management study referred to in the executive summary and put in place the infrastructure necessary to support School Modernization's operations; (iv) put in place project based management tools and reports; (v) develop, in collaboration with the Council, reporting processes that keep Members of the Council informed of the school modernization program; and (vi) complete a review and analysis of the Master Facilities Plan.

- ***Hire Key Personnel*** - Within 4 months, School Modernization will hire a general counsel, procurement officer, director of human resources, deputy director for construction, deputy director for business operations and deputy director for facilities operations and maintenance. Additional support staff will be recruited and hired.
- ***Personnel Realignment*** - Within 6 months, OPEFM will complete a review and assessment of existing OFM employees. During this same time period, as mentioned above, School Modernization will hire a deputy director for the Facilities Operations and Maintenance Division and develop the organizational structure for this division. Existing personnel will be evaluated and considered for assignment to this division.
- ***Management Study*** - The best practices study will be completed within 3 months. Within 6 months, the management consultant will have developed and put in place the various policies and procedures necessary to implement the procurement and personnel regulations. The management consultant will have also put in place document management procedures.
- ***Project Based Management Approach*** - School Modernization intends to put in place a project based management approach. Under this approach, each modernization project will be managed separately. An individual budget and schedule will be managed for each project. Monthly reports will be prepared for each project. These reports will contain a comparison of the project's current status to the project's original budget and schedule.
- ***Reports to the Executive Office of the Mayor*** - School Modernization will coordinate with the Mayor, Deputy Mayor for Education and the Chancellor to develop appropriate avenues of communication to keep them and the general public informed on the progress of projects managed by the office.



- ***Council reports*** - School Modernization will work with the Chairman of the Council and other Members of the Council to develop appropriate methods to keep the Council informed of the modernization efforts.
- ***Master Facilities Plan Review*** - As required by the *OFM Transfer Act*, School Modernization will complete a review of the Master Facilities Plan and submit it to the Council no later than May 31, 2007.

**a. Stabilization Projects**

The goal of the Stabilization Project is to correct existing deficient facility conditions in approximately 73 schools that were not part of the Summer Blitz and Targeted Repair programs that were conducted over the summer months before the beginning of the school year. Plans are to address quality of life building systems and health, safety, fire and building code violations.

**b. Modernization Projects**

Appended to this Transition Plan are modernization construction project reports for the following schools:

➤ ***Ongoing Modernization Construction Projects***

- Brightwood ES
- Rose/Hardy MS/Fillmore Arts Center
- Sousa MS

➤ ***FY 2007 Modernization Construction Projects***

- H.D. Cooke ES
- Alice Deal JHS
- MacFarland JHS
- Phelps Senior SHS
- Randle Highlands ES
- Samuel Wheatley ES
- H.D. Woodson SHS

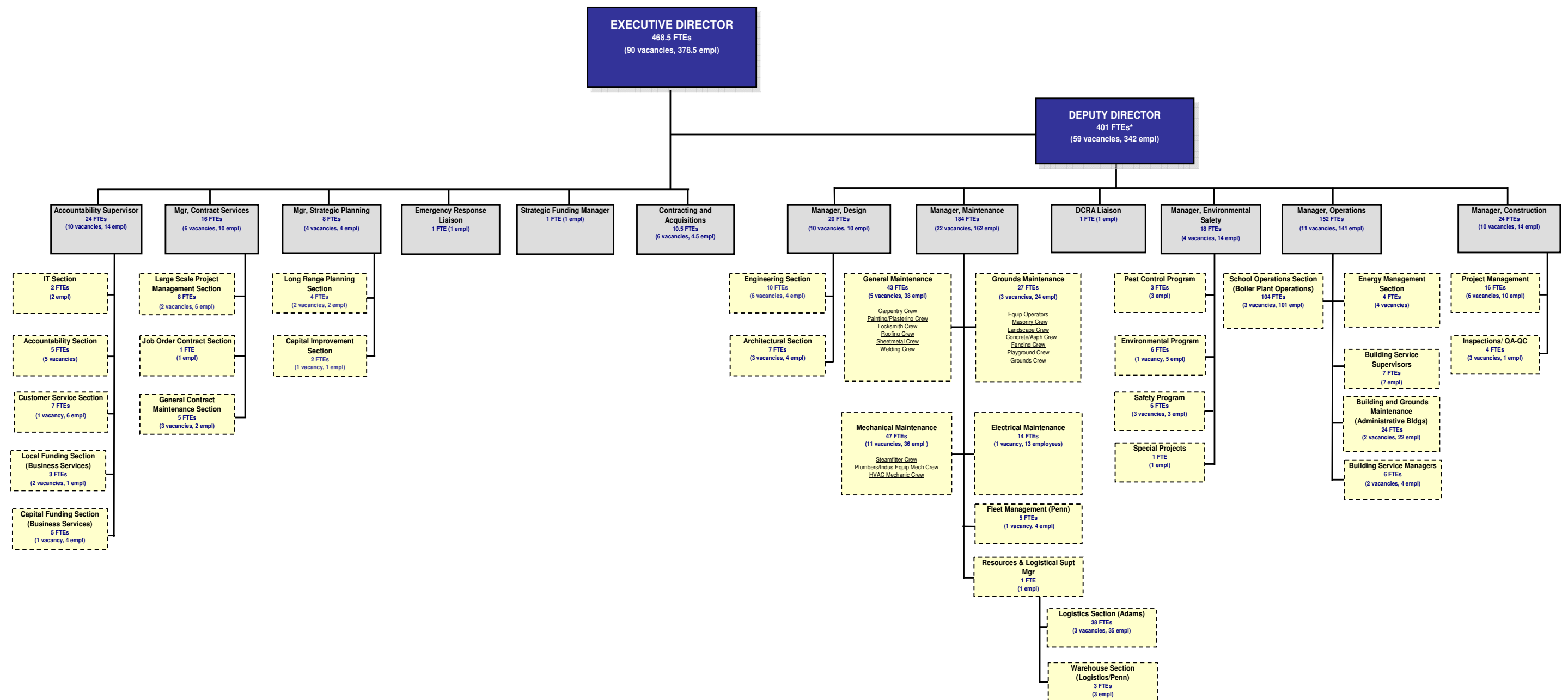
➤ ***FY 2008 Modernization Construction Projects***

- Cardozo SHS
- Savoy ES
- School Without Walls SHS
- Wilson Pool (*Ward 3 Aquatic Center*)



District of Columbia Public Schools

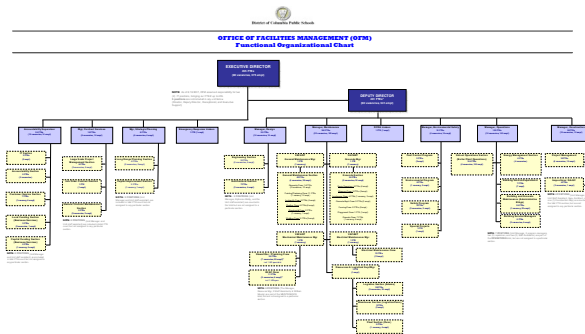
## OFFICE OF FACILITIES MANAGEMENT (OFM) Functional Organizational Chart



### III. THE CURRENT STATE OF DCPS FACILITIES MANAGEMENT

The responsibilities now being undertaken by School Modernization have formerly been those of the DCPS Office of Facilities Management (OFM). It is anticipated that OFM will be incorporated within School Modernization in its entirety, but that School Modernization will complete a thorough evaluation of all aspects of existing operations and personnel in order to determine the optimal organizational structure moving forward. The existing OFM organization therefore represents the starting point for this Transition Plan and the ultimate direction of School Modernization. The organizational chart and narrative description on the following pages describe this baseline.

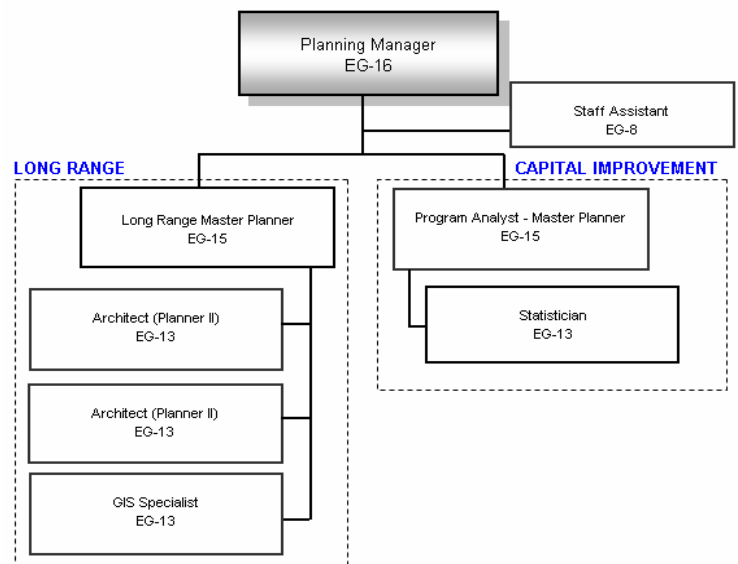
#### A) Overview of Current OFM Organization



The core function of the OFM is to Operate (Boiler Plant Operations, Housekeeping, and Energy Management), Maintain (General Maintenance, Mechanical, Electrical Roofing Maintenance, and Grounds Maintenance), Design (Architectural, Mechanical, Electrical, Civil,), and Construct (project management and inspection for building renovation/modification and new

construction), school facilities for the District of Columbia Public Schools as required to achieve its Mission. Its core functional areas include Strategic Planning, Business Services, Maintenance, Contract Services, Environmental Health and Safety, Construction, Operations, Customer Service, Distribution and Warehousing, and Design are required to deliver core OFM functions in support of its mission statement.

- **Strategic Planning Unit** - The Strategic Planning Unit of DCPS OFM is responsible for planning activities that are required for the effective and efficient delivery of the OFM Comprehensive Maintenance Program. It also manages / maintains building profile data, enrollment data, and k-12 facilities management data, as required, in order to plan program activities that are needed to deliver the OFM Customer Service Model and to support the DCPS



**Strategic Planning Organization**

## Master Education Plan.

The Strategic Planning Unit tracks and maintains:

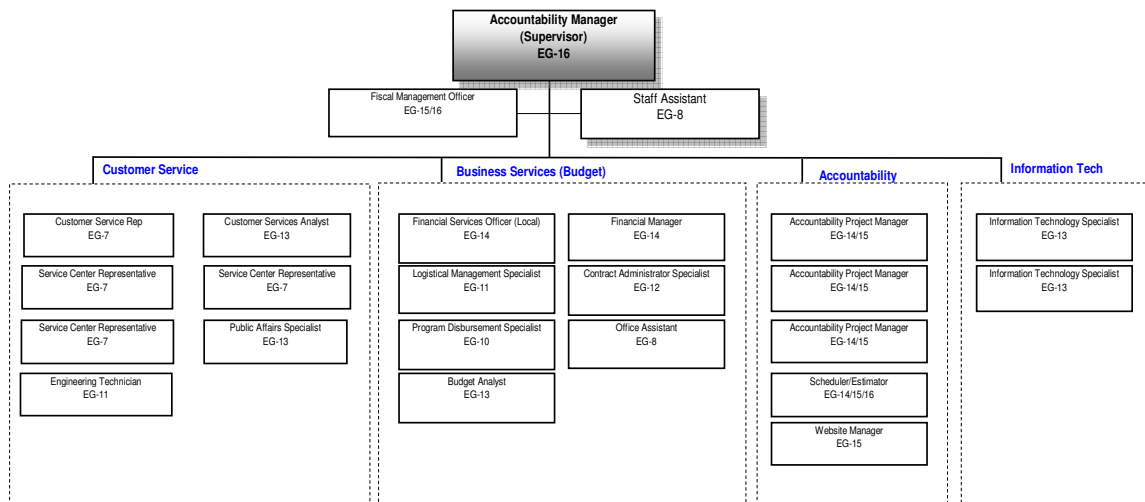
Student Data - including but not limited to enrollment projections and demographics and defines education and business operations program needs.

Building Profiles - Building conditions is analyzed and plans are made to address deficiencies to support program needs.

Program Planning - Comprehensive Maintenance Program, Capital Improvement Program, and Strategic Funding opportunities (PPDP, QZAB, Energy Performance Contracting).

- **Accountability Unit** - The Accountability Unit is a newly formed unit created in May, 2007 and responsible for Performance Measures for modernization projects within OFM. In August, 2007, this unit absorbed responsibility for Technology Services, Business Services, and Customer Service. The information technology section provided helpdesk and new employee setup services for OFM employees and consultants. The Business Services Section is responsible for budgeting, accounting, budget monitoring, reporting and tracking the OFM operations and capital budgets. Business Services (Budget) also: (1) generates various reports as required to document budget spending and performances (2) Processes requisitions, purchase orders, and change orders (3) Provides spending plans and spending strategies for both Operations and Capital budgets.

The Customer Service Section is responsible for coordinating documented work orders and communicating schedules with school-based administrators. Customer Service also works closely with the Environmental Health and Safety Unit to coordinate quality control inspections of completed work orders and housekeeping activities. It also conducts and documents inspections of inhouse maintenance work as well as work performed by outside contractors prior to closing work orders and/or invoice payment. The OFM Customer Services Section primarily focuses on customer relations, work order management, and reporting. Service Representatives act as liaisons between school-based staffing (principals, building engineers and custodians) and the OFM.

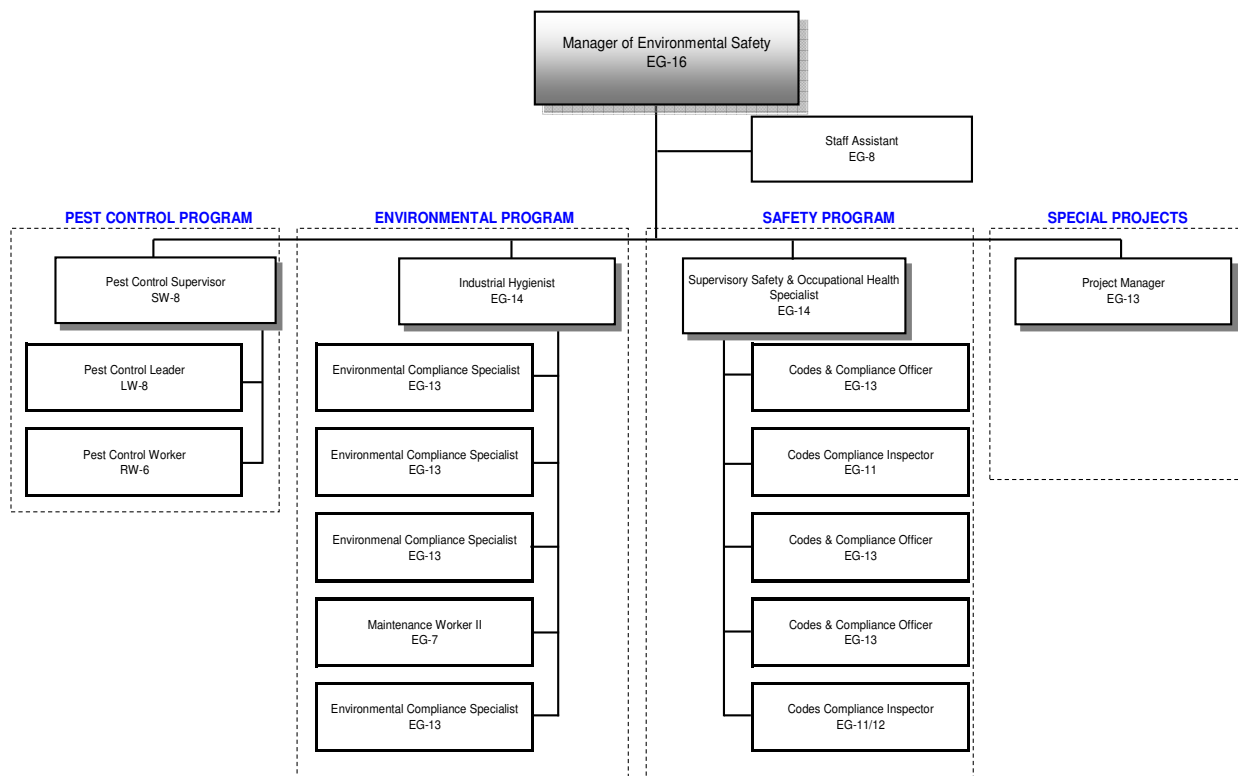


- ***Environmental Health and Safety Unit***

*Environmental Section* - Responsible for activities associated with the OFM Hazardous Materials Management Program; Responsible for Environmental regulatory and Compliance Management; Responsible for developing, implementing and monitoring the OFM Indoor Air Quality Program; Responsible for developing, implementing and monitoring a “Green Building” Program

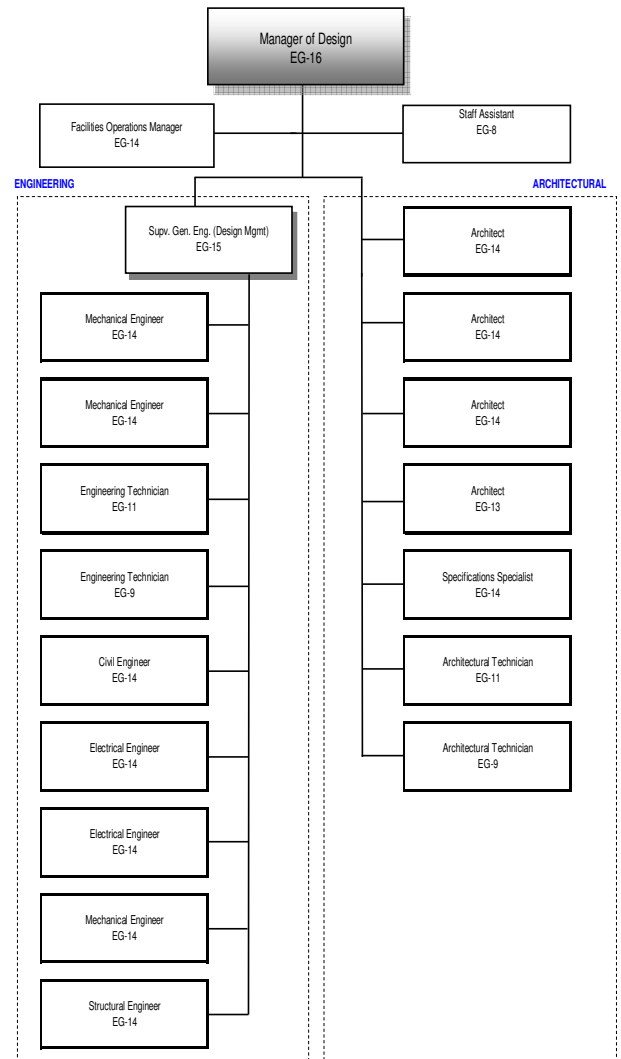
*Safety Section* - Responsible for Life, Health and Safety Compliance Management; Responsible for Facility Risk Management; Responsible for Fire Code Assessments, Inspection and Remediation; Responsible for Code Compliance and Inspections

*Integrated Pest Management Unit* - Responsible for Pest Control and Remediation Activities



## Environmental Health and Safety Organization

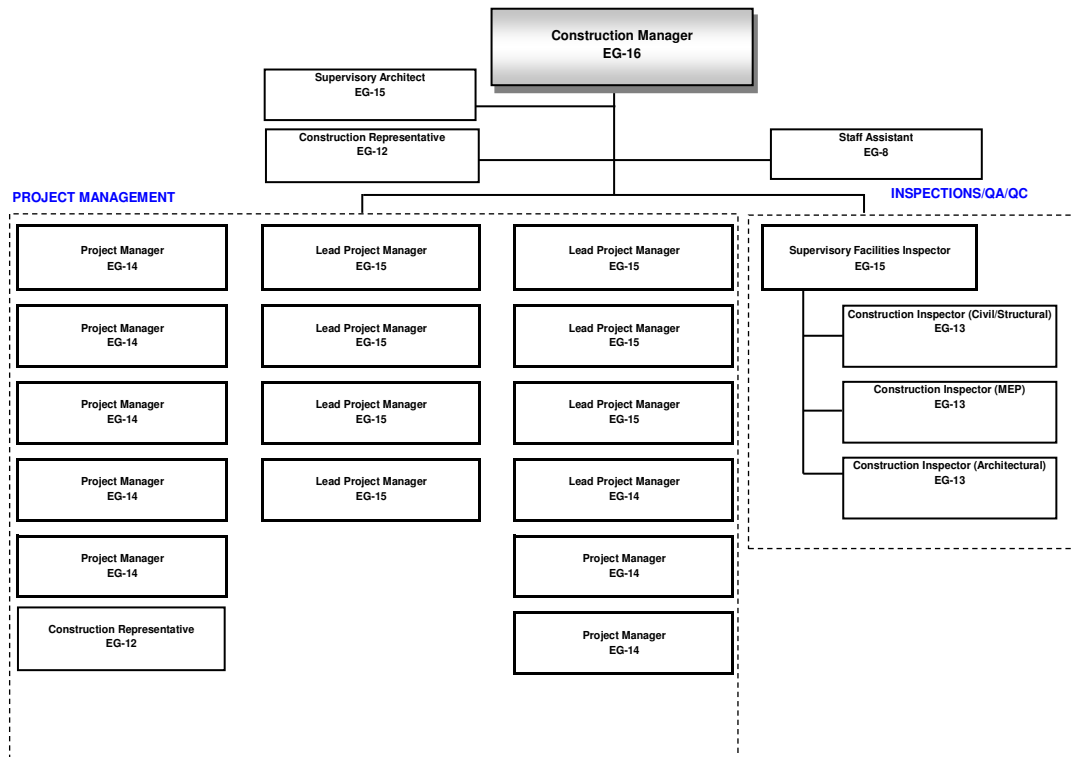
- Design Unit** - The Design Unit is responsible for: (1) The Execution of internal architectural and engineering services (A/E). (2) Program oversight related to architectural and engineering contracted services. (3) Quality assurance and accountability programs related to the delivery of professional A/E services relative to the DCPS Office of Facilities Management *Small Capital & Replacement Program* to include design standards, educational specifications, construction requirements, renovation and rehabilitation standards, components replacement requirements, small capital project scope definition, ADA compliance and upgrades, and Court Ordered Mandate requirements. (4) Design/technical support activities that are required to support activities within the Operations, Maintenance and Contract Services Unit to ensure the delivery of services relative to the DCPS Office of Facilities Management *Comprehensive Maintenance Program*. (5) Various reports as required to document performances relative to project/design milestones and budget.



### Design Unit

- Construction Unit** - The Construction Unit is responsible for:
  - Internal and Contract Program Management/Construction Management (PM/CM)
    - Execution of internal Program Management/Construction Management.
    - Program oversight related to PM/CM contracted services
    - Quality assurance programs related to the delivery of professional PM/CM services relative to the DCPS Office of Facilities Management *Capital Construction Program*
  - Inspections & Quality Control/Quality Assurance
    - Inspections and the execution of quality assurance and accountability program as required to ensure the delivery of services relative to the DCPS Office of Facilities Management *Capital Construction Program*.

- Inspections and the execution of quality assurance and accountability program as required, to support activities within the Operations, Maintenance and Contract Services Unit to ensure the delivery of services relative to the DCPS Office of Facilities Management *Comprehensive Maintenance Program*.
- Generates various reports as required to document performances relative project milestones, budget, quality control and accountability.

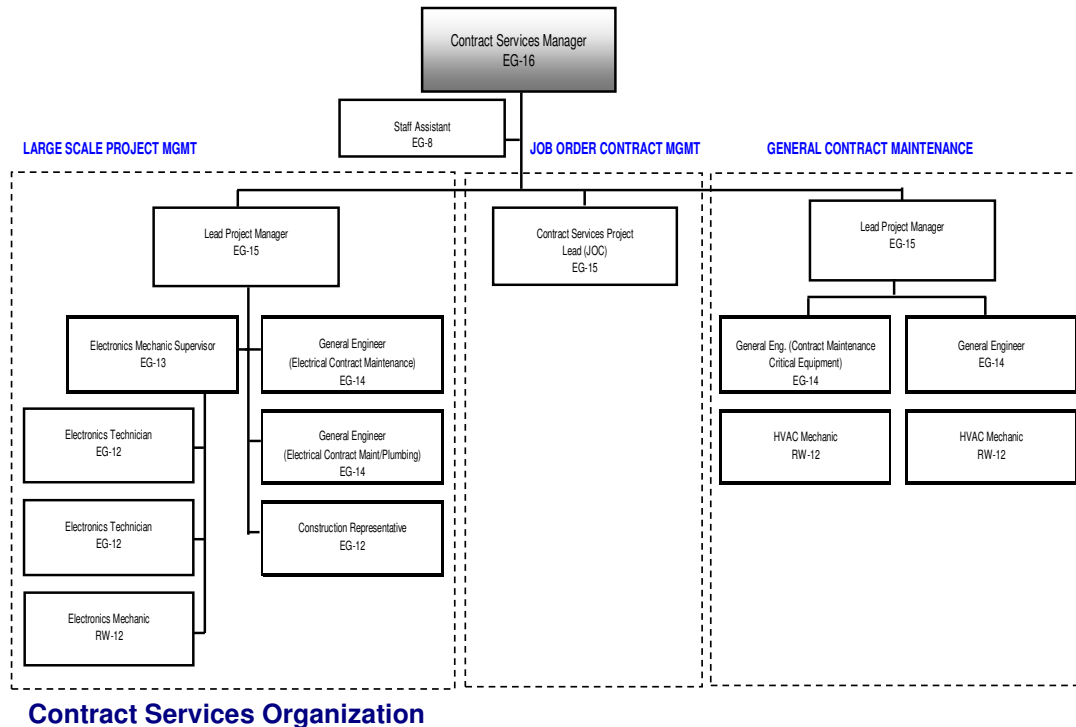


- ***Contract Services Unit*** - The Contract Maintenance Services Unit functions in a support capacity for Operations, Maintenance, Design, and Construction personnel. This unit is responsible for coordinating service contracts for general maintenance, mechanical services, electrical services and various specialized service contracts (fire alarms, plumbing, elevators, sprinkler systems, Job Order Contracting, boiler cleaning, HVAC preventive maintenance, site work, landscaping concrete, asphalt etc.). This unit also manages:

*Small Capital Improvements and Major Maintenance Projects* - Responsible for executing capital improvement projects via established contracted services.

*Quality Assurance and Accountability* - Monitors deliverables and contracted services and supplies provided to the District of Columbia Public School Facilities.

Standard Operating Procedures - and internal office processes associated with program management activities related to facilities management services delivered via outsourced contracted services. Responsible for developing and delivering performance reports associated with the delivery of contract services.



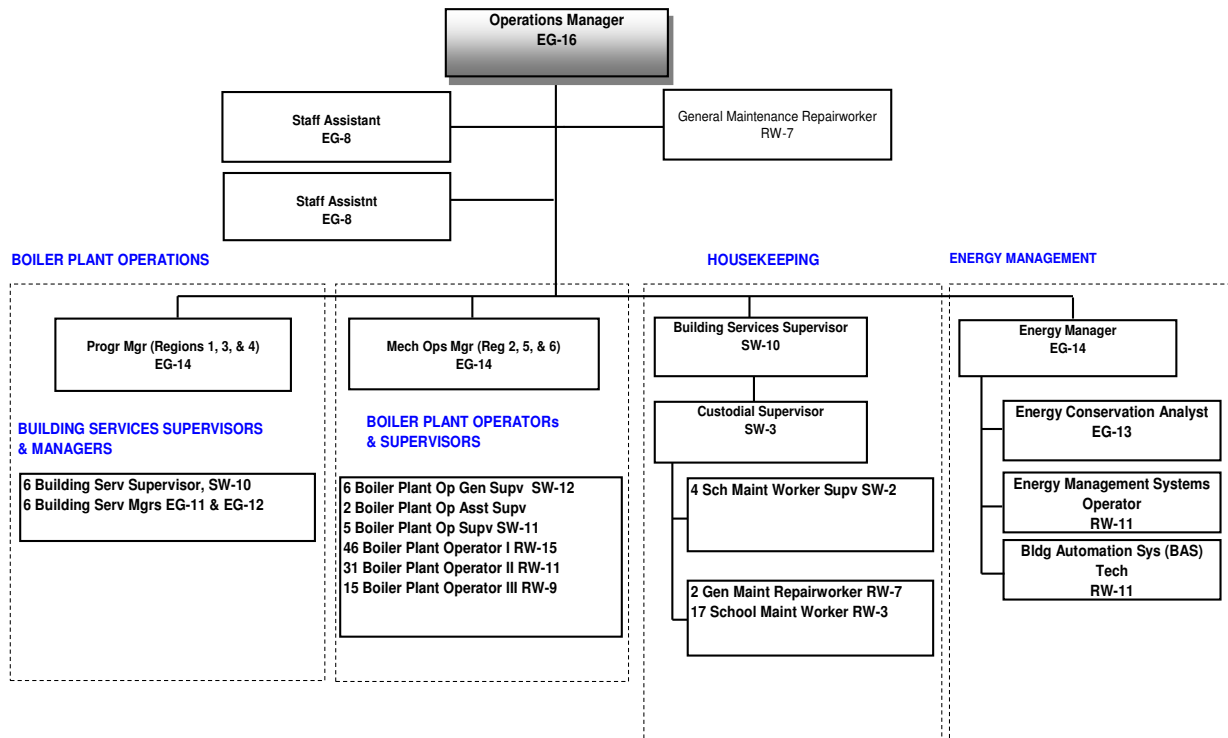
- **Operations Unit** - The Operations Unit has three (3) sections:

Building Engineering Section - Responsible for building operations activities to include the operation and inspection of boilers, mechanical devices, chillers, air handling units, pumps, swimming pools, and moderate mechanical preventive maintenance activities.

Building Operations/Housekeeping Section - Responsible for the day-to-day cleaning and sanitation of the DCPS administrative buildings. Due to staffing shortfalls at the school based level, provides staff augmentation services to site based custodial personnel at the customers request. Provide level-one maintenance, assists on moderate preventive maintenance activities, and site based inspections of building components.



Energy Management Section - Responsible for establishing utility and energy management programs; notifying appropriate OFM staff of emergency building automation (DDC) deficiencies while monitoring and adjusting DCPS building automation systems associated with building heating and cooling systems; and for coordinating required repairs and maintenance of DCPS DDC systems associated with building heating and cooling systems.



## Operations Organization

- **Maintenance Unit** – The Maintenance Unit has (8) Sections:

General Maintenance Section - Responsible for Carpentry, Plastering, and Painting Repairs

Mechanical Maintenance Section - Responsible for Plumbing and Mechanical (HVAC) Repairs

Electrical Maintenance Section - Responsible for Electrical Repairs

Roofing Maintenance Section - Responsible for Roofing and Glazing Repairs

Grounds Maintenance Section - Responsible for in-house personnel as required for repair and maintenance of playgrounds, fence repair, landscape, masonry, cement/asphalt, snow removal, irrigation systems and bulk trash removal

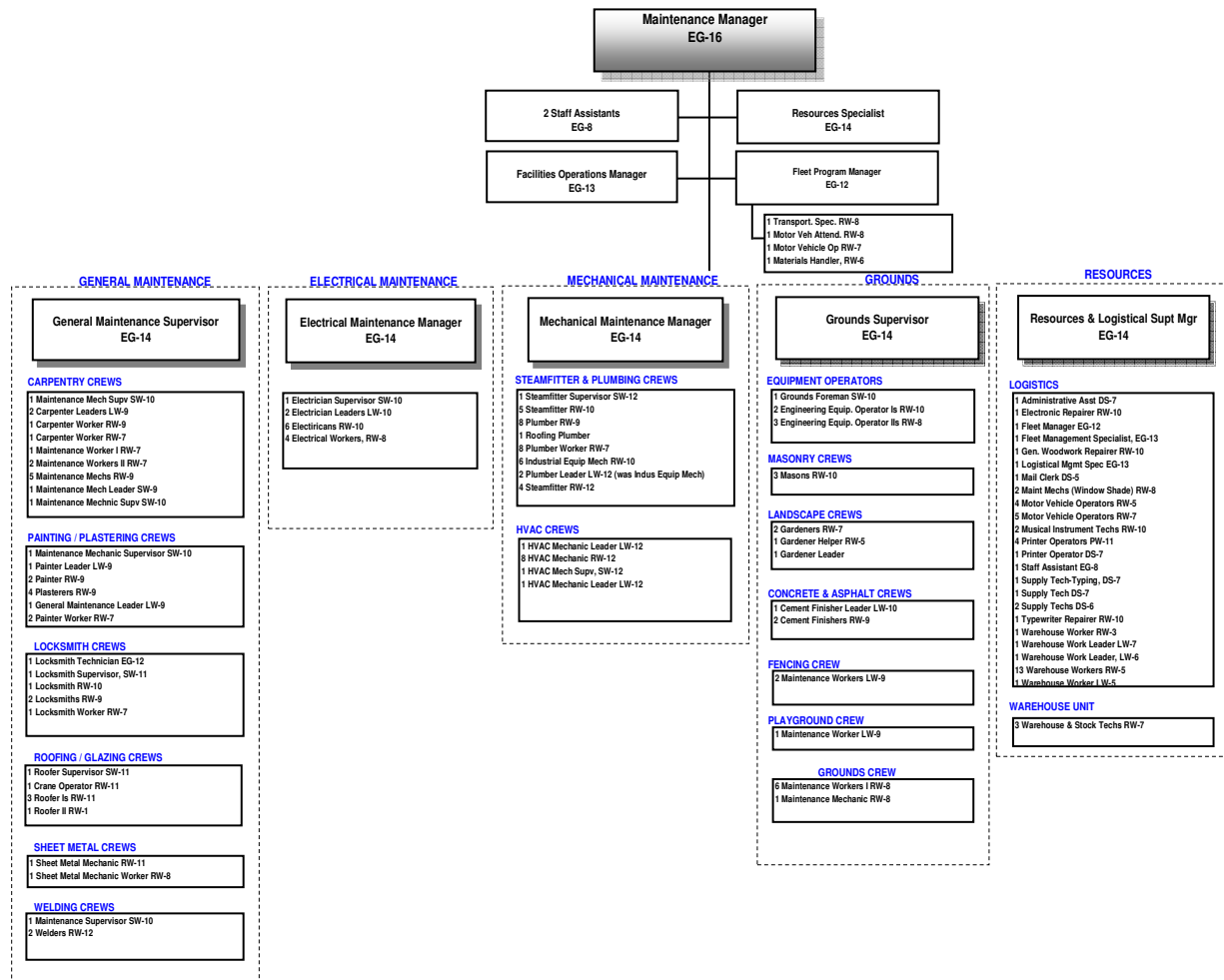
Warehousing Section - Responsible for material receiving, stocking/warehousing, and tracking of maintenance and operations inventory, supplies and materials

**Fleet Management Section** - Responsible for the maintenance and monitoring the OFM maintenance and operations vehicle fleet

**Logistics Unit** - Responsible for DCPS (district wide) material handling, warehousing, distribution and moving services

Responsible for furniture, instrument and minor window treatment fabrication

- **Printing** Document reproduction, Mail Distribution
- **Technical Support** Furniture Repair, Musical Instrument Repair, Window Shade/Blind Fabrication
- **Property Management** Asset Inventory, Tracking and Moving; Asset Surplus Management
- **Supply Management** Supply and Material Receiving, Stocking Storing, Distribution and Moving



## Maintenance Organization

## **Functions and Job Descriptions**

- ***Strategic Planning Unit*** - The Strategic Planning Unit is comprised of Architects with specialties in urban planning.

Architects (Planner I) - serve as architects with responsibility for the design, layout, and construction of buildings; incumbents conduct or direct investigations of project sites to determine new construction feasibility of proposed projects; center line, profiles, and elevations; and essential linear and angular measurements; or the condition of structure and essential data prior to initiating design.

Architects (Planner II) - are responsible for the technical and business management of designated major building projects from preliminary planning stage through the design, construction, equipment installation, and check out stages; they also determine the need for new or revised specifications and criteria as a result of reading technical literature, reviewing field investigation reports, and proposed plans and specifications and discussions with regional offices of the agency, architect-engineering firms, construction or equipment contractors, other professional architects or engineers and subject matter experts.

Architects (Planner III) - serve as Senior Architects with overall responsibility for the technical and business management of designated major building projects from the preliminary planning stage through the design, construction, equipment installation, and check-out stages.

Planning Managers - direct the projects of the architectural and engineering units that help to facilitate the Capital Improvements Program for DCPS; has mastery managerial skills in broad areas of expertise to expedite projects

- ***Accountability Unit*** - The positions within this unit are comprised of Accountability Project Managers, Budget (Financial) Managers, Contract Administrators, Information Technology Specialists and Customer Service Representatives.

Accountability Managers - serve as managers who monitors all costs, schedules, and performance measurements of the Capital Improvement Program (CIP) and its Comprehensive Maintenance Program (CMP). The Accountability system includes: policy and risk assessment; program quality assurance oversight; real-time web based program management oversight; program master schedule and project delivery tracking; master cost estimating and budget management; and periodic reporting.

Financial Managers - interpret and develop budgetary and accounting policies and procedures that support the overall operation as it relates to fiscal management of the agency.

Budget Analysts - utilize existing spreadsheets or other forms to analyze, review, and recognize potential areas of concern or greater interest; researches guides and various other sources of budgetary information that may be used by higher grade coworkers for purposes of analysis and application; and uses various budget analysis tools to create summaries and reports to supervisors, stakeholders, or executive staff concerning various budget actions, processes, or overarching issues.

Customer Service Analysts/Representatives - serve in the Service Center to receive facility and service issues relating to repairs, alterations, maintenance, preventative maintenance, heating, air conditioning, electricity, energy management, cleaning, landscape maintenance, quality control, and security.

Information Technology Specialists - plan, coordinate, and schedule the installation, configuration, maintenance and upgrade of new or modified hardware and operating systems and enterprise management or applications software; manage system resources including performance, capacity, availability, serviceability and recoverability; and ensure systems availability, functionality, integrity and efficiency.

- ***Environmental Health and Safety Unit*** - This unit oversees and manages three (3) primary programs: Pest Control Program, Environmental Program and Safety Program. The Pest Control Program workforce is comprised of Pest Control Supervisor, Leader, and Worker. The agency's Environmental Program is led by an Industrial Hygienist and is comprised in Environmental Compliance Specialists. The Safety Program is managed by the Supervisory Safety and Occupational Health Specialist and its mission is carried by Codes and Compliance Officers with varying levels of responsibility and expertise.

Pest Control Supervisor, Leader, and/or Worker - work with a wide variety of insect, vertebrate, and plant pests including those not commonly recognized and often hard to find. Utilizing suitable control methods to reduce and control hazards to public health, stored products, structures, and vegetation the employee selects, mixes, and applies restricted and general use pesticides. These individuals plan work sequences and conduct trouble-shooting inspections of buildings and grounds for evidence of conditions conducive to damage and infestation by insects, rodents, predatory animals, and other pests.

Industrial Hygienist - reports on the status of HAZMAT management activities, incidents involving disruption to student activities due to HAZMAT abatement, and on indoor air quality (IAQ) concerns. The Industrial Hygienist has multi-disciplinary knowledge of toxicology, health effects, human exposure pathways of contaminants; their chemical and physical properties, fate/transport mechanisms and modeling of contaminants in soil, water, and air; and applicable or relevant and appropriate requirements (ARAR) is necessary.

Environmental Compliance Specialists - respond to environmental emergencies, asbestos, indoor air quality, fires, and health-related issues. These specialists service the Water Treatment Program, Lead in Water, Paint Program, Quality Building Environment Program Indoor Air Quality Program, Asbestos Hazard Emergency Response Act and all Environmental Remediation Projects.

Supervisory Safety and Occupational Health Specialist - identifies and analyzes potential severity and frequency of safety and health risks, and measures the exposure of loss and liability issues for the school system. The incumbent is responsible for negotiating complex highly sensitive safety and health matters with the District of Columbia Health

Department, District of Columbia Fire Department and the District of Columbia Office of Emergency Preparedness.

Codes and Compliance Officers - plan, coordinate, and execute the school district's Fire Code and Life Safety Program, develops Fire Emergency Evaluation procedures for all facilities within the school district and is responsible for being proactive in fire code compliance.

Facilities Operations Manager (for Environmental Health & Safety) - plans, develops and coordinates the environmental and safety programs with internal and external facilities management such as the Directorate, Customer Services, Planning, Business Services, Operations, Maintenance, Design, and Construction staff, Department of Public Works, Department of Parks and Recreation, Department of Health, DC Housing Authority, Utilities Organizations, Mayor's Office, citizens and community leaders, etc. to ensure coordination of operations, maintenance, and construction projects.

- **Design Unit** is comprised of the Design Manager, Mechanical Engineers, Electrical Engineers, Structural Engineers, Architects, Architectural and Engineering Technicians.

Design and Engineering Manager - directs the projects of the architectural and engineering units that help facilitate the Capital Improvements program for DCPS; supervises all staff architectural, civil, structural, mechanical, and electrical engineers and provides technical leadership.

Mechanical Engineers - direct the projects of the mechanical units; plans, recommends, and develop all capital projects which involve mechanical engineering design services, whether performed by staff personnel or by contracted firms.

Electrical Engineers - serve as Senior Electrical Engineers and manages electrical engineering projects as required to facilitate electrical design and design management activities associated with the Capital Improvement Program for DCPS; exercises direction of a variety of activities involving electrical design and engineering projects, in keeping with program requirements, which complies with all applicable building, health and safety codes; incorporates current technology and other design elements such as energy conservation methods, as appropriate.

Structural and Civil Engineers - are responsible for understanding and applying pertinent aspects of the construction industry, structural/civil engineering and the physical sciences related to structural/civil/site design and construction; has extensive knowledge of the principles and practices of structural and/or civil engineering and construction; expert knowledge of structural/civil engineering and other related disciplines.

Architectural and Engineering Technicians - are responsible for preparation of CADD drawings and design in support of architectural and engineering functions performing various design analyses, investigations, and related reports.

- **Construction Unit** - The Construction Unit is comprised of a Project Management arm and an Inspections (Quality Assurance/Quality Control) section. The DCPS Capital Improvement Program (CIP) consists of large-scale construction/renovation projects (to

include whole facility renovation and complete new construction) and small-scale individual projects (completed through conventional procurement Delivery/Indefinite Quantity (IDIQ) scenario.) The Construction Project Management section is composed of Projects Managers, Lead Project Managers, and Construction Representatives. The Inspections Section is comprised of a Supervisory Facilities Inspector and subordinate Construction Inspectors. A Construction Manager and Supervisory Architect provide insight and direction in both sections of Construction.

(Lead) Project Managers - manage and oversee the quality of construction and renovation of a designated number of projects to ensure assigned projects are on schedule and within budget; reviews designs and construction documents for constructability; and works in coordination with the DCPS Design/Engineering section as needed to coordinate activities concerned with technical developments, scheduling, and resolving engineering design.

(Supervisory) Facilities Inspectors - These positions monitor building inspection services to ensure contractor compliance with architectural plans and specifications. This individual may also be required at times to supervise inspection staff in the Construction Management Unit.

Construction Representatives - plan inspection work and incidental functions in connection with construction work being performed by employees and contractors to ensure that all work conforms to the plans and specifications under each of the contracts involved, and that the work is being performed in accordance with policy requirements. Maintains continuous contact with contractor's representatives to coordinate plans, efforts, and objectives.

Construction Manager (Supervisory Construction Analyst) - provides administrative and policy direction in terms of broadly defined missions or functions; the incumbent is responsible for supervising DCPS construction function with the objective of planning, developing, monitoring, and completing capital program projects.

Supervisory Architects - plan, recommend, and develop capital projects which involve architectural design services; provide direction for a variety of activities involving architectural design projects; update and improve design standards, guidelines and construction contract requirements, ensuring they incorporate current industry standards, practices and technology. These positions require a Bachelor of Architecture or Master of Architecture Degree from an accredited school of architecture. The incumbent have knowledge of the physical and mathematical sciences underlying professional design and engineering sciences and techniques and their applications to design and engineering.

- **Contract Services Unit** - functions in a support capacity for Operations, Maintenance, Design, and Construction personnel. This unit is responsible for coordinating service contracts for general maintenance, mechanical services, electrical services and various specialized service contracts. Its workforce is comprised of a Contract Services Manager, three (3) Lead Project Managers, two (2) HVAC Mechanics, four (4) General Engineers, and an Electronics Section with a Supervisor and subordinate Electronics Technicians.

*Contract Services Manager (Supervisory Facilities Operations Specialist)* - is the Senior Principal Manager for all contractual administrative matters affecting DCPS Facilities; provides broad agency oversight and strategic planning for contracts affecting operations and maintenance, planning, design, and construction-related contracts exceeding \$200MM annually; and oversight and controls for the execution of minor capital construction projects and contracts ranging from \$2K to \$200K.

*(Lead) Project Managers* - manage and oversee the quality of construction, repair, and renovation of a designated number of projects to ensure assigned projects are on schedule and within budget; reviews designs and construction documents for constructability; and works in coordination with the DCPS Design/Engineering section as needed to coordinate activities concerned with technical developments, scheduling, and resolving engineering design.

*Heating and Air Conditioning Equipment Mechanics (HVAC Mechanics)* - perform the full range of work involved in the repair, overhaul, maintenance, and servicing of industrial and domestic reach reach-in and walk in refrigerators, air conditioning units and systems, ventilating systems, freezers, water coolers, dehumidifiers, and related equipment; and cold storage and cold room equipment. Incumbents are also responsible for troubleshooting, repairs, and/ or installations of large complicated heating units and systems including oil or gas fired low and higher-pressure boilers, steam production and distribution plans or turbine and generator power plants.

*General Engineers (General Contract Maintenance, Electrical, and/or Plumbing)* - serve as Project Managers responsible for directly overseeing the day-to-day operations for all assigned General Maintenance, Electrical, and/or Plumbing contract services, but not limited to on-call contractual services, technical construction, emergency repairs And Maintenance Service Contracts Servicing Over 150 Buildings

*Electronics Mechanics (and Supervisors)* - are responsible for various electronic and mechanical systems in over 150 buildings that support the educational efforts of DCPS. Incumbents conduct building surveys to determine the requirements for Security Alarms, Clocks and Bells, Fire Alarms, Elevators, and Escalators and is responsible for the development of specifications and cost estimations for the required equipment to protect and service these facilities. These supervisors are also responsible for the management and supervision of all contract services used to provide inspection, certification, maintenance, and repair of life safety and mechanical systems including emergency generators and power transfer systems, sprinkler systems, suppression systems, and fire extinguishers.

- ***Operations Unit*** - is comprised of 3 sections (1) Building Engineering (Boiler Plant) Section; (2) Building Operations and Housekeeping Section for administrative buildings; and an (3) Energy Management Section. Each section is comprised of Boiler Plant Operators and Supervisors, School Maintenance Workers, and Energy Professionals, respectively. In addition there are Facilities Operations Managers to provide general operations oversight and for responsiveness to emergencies and repairs to school facilities.

Boiler Plant Operators (levels I, II, and III) - are building engineers with responsibility for oil, gas, or electric hot water or steam low-pressure (60-405 BHP) boiler plant operations; prepares boilers for inspections by: completely dismantling, cleaning, draining, removing soot and waste, vacuuming tubes, painting, and lubricating all moving parts. Distinctions are made by type of DC Steam Engineers license; 3<sup>rd</sup> Grade (BPO I), 6<sup>th</sup> Grade (BPO II), or no license (BPO III).

School Maintenance Workers - are assigned to a specific administrative building and performs a variety of cleaning and maintenance tasks in a school or administrative facility in an orderly, safe and sanitary manner.

Energy Manager, Conservation Analyst, and Systems Operators - develop and implement goals and objectives of energy conservation programs for DCPS; prepare budgets for energy commodities; and diagnose and repair deficiencies found in the Building Automation Systems (BAS) and Direct Digital Control (DDC) controls. They also coordinate with mechanical, electrical, and contract maintenance staff to resolve repair issues.

Program Managers - are responsible for supervising and managing administrative personnel for maintaining and monitoring the work productivity; assures all day-to-day emergencies are responded to and all work orders are planned and scheduled; is responsible for the overall communication with building engineers for the purpose of planning, scheduling, and implementation of various policies, procedures, and programs that will effect the day-to-day physical plant operations for establishing work schedules, and implementing weekend and inclement weather work schedules.

- **Maintenance Unit** -

Carpenters - fabricate and install frames or casings for windows, doors, transoms, and ventilators; patches and repairs floor areas; install doors and window sashes; perform general painting duties; and repair and install all types of interior trim such as woodwork, baseboards, molding, and paneling.

General Maintenance Workers and Mechanics - perform general maintenance and carpentry repairs on building structures. These individuals perform general maintenance and repairs of building structure-related systems or structures.

Plasterers - do plastering work on the construction or repair of interiors, partitions, and ceiling regardless of size to any of the schools or administrative office buildings.

Cement Finishers - provide concrete finishing services at any of the DCPS facilities; the work involves working on difficult projects requiring precise measurements in order to measure and set forms in curves as well as in straight lines.

Sheet Metal Mechanics - repair, install, and replace worn or damaged parts pertaining to sheet metal on all igloos, warehouses, and yurts and to manually and mechanically operated doors; repairs, installs, and replaces worn or damaged vents, fire control dampers, weep valves, etc., and similar tasks in connection with sheet metal work on articles such as cornices, canopies, ventilators, and transition elbows.



Welders - repair, modify, and fabricate items or equipment normally comprised of commonly used metals through gas, arc, or electric welding processes and performance of attendance preliminary preparation or similar related work.

Locksmiths - are responsible for fabrication of new keys for locks from duplications, impressions and key codes; they operate key cutting machines to duplicate keys or cut new keys from available key codes.

Roofers (Leaders) - performs roof repair work involving application or repair of corrugated, crimp, metal roofing, transit, tar and gravel; built up smooth surface RPM and SIS hot roofing.

Electricians - apply a significant knowledge of electrical principles to maintain and repair a variety of existing power and lighting systems in buildings, shops and offices; install, modify, and maintain a variety of electrical systems; and install, maintain, and repair electrical wiring systems, related switches, distribution panels and outlet boxes, as well as a wide variety of electrical fixtures, tools, and appliances.

Plumbers - perform the full range of journey level plumbing duties such as installing, repairing, and modifying water supply, sewage disposal, gas distribution, oil lines, and similar utility systems and equipment; independently installs, modifies, repairs, and maintains a variety of new and existing utility, supply, and disposal systems and equipment such as sewage, water, oil, and gas distribution systems, and water closets, tubs, backflow prevention devices/assemblies, fire sprinkler systems, and showers.

Steamfitters - work alone or as leaders of maintenance teams performing a variety of highly specialized shop and field operations associated with the fabrication, installation, modification, maintenance, and repair of air, water, gas, oil, vacuum, chemical and other specialized pipeline systems of the HVAC trade.

Heating and Air Conditioning Equipment Mechanics (HVAC Mechanics) - Perform the full range of work involved in the repair, overhaul, maintenance, and servicing of industrial and domestic reach reach-in and walk in refrigerators, air conditioning units and systems, ventilating systems, freezers, water coolers, dehumidifiers, and related equipment; and cold storage and cold room equipment. Incumbents are also responsible for troubleshooting, repairs, and/ or installations of large complicated heating units and systems including oil or gas fired low and higher-pressure boilers, steam production and distribution plans or turbine and generator power plants.

Masons - perform a variety of bricklaying tasks including but not limited to: maintaining, repairing, altering, and constructing walls, partitions, and foundations built of common brick, face brick, cinder block, concrete block, gypsum block, glass block, hollow tile and terra cotta tile facing.

Gardeners - plan and carry out gardening work according to the schedule or project assignment, keeping within the framework of established gardening practices

- **Logistics (Maintenance)** - The Logistical Support Section of Maintenance is responsible for providing warehousing, distribution, property accountability and management services for DCPS. It is led by the Resources and Logistical Support Manager with staff

comprised of Warehouse Workers, Printing Officers, Supply Technicians, Musical Instrument Technicians, and Fleet Managers.

*Resource and Logistical Support Manager* - exercises working knowledge of appropriate supply regulations and DCPS unique characteristics of material and financial accountability to understand local policies, procedures and techniques to expedite operation and increase effectiveness; incumbent outlines policies, program requirements, objectives, and resource limitations; and exercises independent judgment in planning, organizing, and directing the technical aspects of program objectives, compliance with prescribed policies, and satisfaction of technical requirements and efficient functioning of the organization.

## **Financial Review of OFM**

School Modernization has contracted with an independent auditing firm, Thompson, Cobb Bazilio & Associates, PC (“TCBA”) to assess the current financial operations and information technology (IT) infrastructure of OFM and to identify any inherent and business risk that School Modernization may inherit as a result of the transfer of all assets, personnel and funding authority for maintenance conducted by OFM. This summary presents an overview of what TCBA determined through a series of interviews, on-site observations and testing. TCBA’s recommendations follow this summary.

- ***Overview***  
TCBA’s assessment of the OFM reveals that internal controls are not adequate.
- ***Inventory of Contracts, Purchase Orders and Related Data***  
There is no readily available report that provides a listing of all Purchase Orders (PO) with key attributes such as PO number, original PO amount, changes to the original PO amount, contract number, amount paid, and remaining PO balance.
- ***Budget***  
There are opportunities for improving efficiency and effectiveness in the budget process through filling vacancies, training staff and providing access to the right budget management tools.
- ***Procurement***  
Procurement internal controls require strengthening. A quality assurance process should be incorporated, as well as formalized staff training.
- ***Invoice***  
Invoice processing internal controls require strengthening, including better maintenance of invoices and supporting documentation, adherence to approval requirements and enhanced invoice tracking capabilities.
- ***Information Technology***  
Information Technology support needs to be enhanced to include better IT risk management. The risk management program should address end-user staff training, stronger physical security controls, resource management, and a process to evaluate system enhancements to make certain that OPEFM control objectives are met.

## **Recommendations**

TCBA recommend management’s consideration of the following:

- OPEFM should conduct periodic review of the data input into the database. OPEFM should hire two additional resources to put the contract data into the database correctly and reconciling the data periodically to PASS for better availability of accurate contract and vendor data for review and management decision making.
- Separate Budget functions from Accountability and hire adequate number of skilled budget and planning specialists (make transfer from DCPS Budget Office).

- Implement policies and procedures for budget preparation and continuous monitoring. Obtain access to CFO\$Source. Implement a systematic reporting and review structure and provide periodical training to staff to update their budgetary and planning skills.
- OPEFM should implement a Quality Assurance Review process to ensure that procurements and contracts have gone through the required approval process, have appropriate supporting documents and are in compliance with applicable laws, regulations and policies. Implement a professional staff development training program.
  - PASS system should have system controls that are aligned with OPEFM's approval policies. Enhance PASS to support invoice tracking. Also consider scanning and imaging documents for electronic archival. OPEFM should ensure the proper supporting documentation for all invoices. All invoices need to be certified by project managers on the basis of their verification of supporting documents submitted to them.
  - OPEFM should develop and implement an IT Risk Management Program. Provide adequate training on available technology. Automate the process for PR certification for construction invoices. Implement the IT best practices briefly discussed in TCBA's report.

## **IV. EXTERNAL MODELS**

OPEFM recognizes that the current organizational structure within the OFM requires major restructuring in order to develop efficient business systems, to improve productivity, to align resources that are required to deliver services that meet the needs of the students, employees, community and stakeholders throughout the District of Columbia. To meet this goal, it is critical that a careful analysis and comparison of alternate organizations be performed. There is a need to analyze, abstract and implement best business practices that are used in the public and private sectors. Benchmarking against the wide range of delivery methods and management approaches in the core facilities management service area (i.e. Facilities Operations, Maintenance, Design and Construction) will aid the OPEFM in structuring the best organization with the highest standards and quality that has been long outstanding in our public school system.

In light of these critical requirements, OPEFM has taken several approaches to review, discuss, and benchmark against the facilities management industry for the sole purpose of analyzing Alternate Organization Paradigms and developing the best business structure necessary to meet the needs of the District of Columbia, to improve efficiencies, and to develop a customer oriented service operation that far surpasses the customary delivery models throughout the industry.

### **A) Comparable Models**

In order to recognize the desired results while building its organization, OPEFM has researched organizational and fiscal structures of Facilities Management entities currently serving K-12 school systems in various states throughout the Eastern region of the country. This benchmarking effort capture organizational and fiscal data of Facilities Management organizations in the states of Connecticut, New York, Pennsylvania, Delaware, Maryland, and Virginia (see following pages). The data summarized and allowed for the evaluation of key information relative to mission, goals and objectives, management structure, staffing capacity, contracting capacity, core service delivery, and specific functions or roles that various facilities organizations play in support of teaching and learning in the local school environment at their respective school district.

Our observations have found that the overall budget structure associated with the delivery of building operations, maintenance, design and construction was similar in most instances and that the core functions and services offered were basically identical. Furthermore, it was determined that even though the services provided varied minimally, the main difference was found in the variations in terms of management structure. That is to say that in most cases the high-level reporting structure focused on Building Operations, Building Maintenance, Planning, Design and Construction with some variation in the management of services associated with Grounds Maintenance, Environmental & Safety, Energy Management and Capital Planning (see following pages).

Additional noteworthy findings surfaced in the areas of staffing capacity associated with Maintenance Services, management structure associated with School-based Custodial services, and available funding for outsourcing of Contracted Services associated with critical and/or complex maintenance activities.

## **B) Benchmarking Research**

This research may be supplemented with study of comparable systems that have some direct relevance to DCPS. Although DCPS and, indeed, the District of Columbia itself, are unique in many ways, there is no doubt that useful lessons may be derived from study of the facilities management and modernization arms of nearby school systems or those in areas with similar demographic and socioeconomic characteristics. Useful points of comparison therefore include both the District's nearby neighbors, as well as other major urban public school systems nationwide. As of the date of this document, OPEFM is undertaking study of a number of appropriate models through independent research and interviews with representatives of those school districts.

School districts in neighboring jurisdictions operate in much the same market environment as the District, with regard to the costs of goods and services, as well as the cost of living which drives personnel compensation. However, because the District is the urban center of its region, there are many ways in which the issues faced by neighboring jurisdictions are limited in value for comparison. It is therefore equally instructional to study national models chosen from among major urban public school systems. OPEFM intends for this research to encompass the following examples.

### **➤ *Regional Neighbors***

- Prince George's County
- Montgomery County
- Fairfax County
- Baltimore County
- Baltimore City

### **➤ *National Models***

- New York
- Philadelphia
- Chicago
- Los Angeles

As part of the transition effort, OPEFM will complete comprehensive benchmarking research on comparable school systems and their facilities modernization capacities.

This research will comparatively address:

- Number, age, and types of facilities in system
- Geography and demographics served
- Organizational structure
- Operating budget

- Overall budget
- Line item costs for comparison
- Capital budget
- Overall budget
- Line item costs for comparison
- Procurement practices
- Personnel policies
- Contracting and project implementation practices



*Government of the District of Columbia*  
**Office of Public Education Facilities Modernization**  
**Transition Plan: Benchmarking for Success**

	<b>FY 2008 Adjusted O&amp;M Budget</b>	<b>Cost by Building Square Foot</b>	<b>Cost by Student Enrollment</b>
<b>Contract Services - OFM Adjusted FY 2008 Budget</b>	\$1,012,919	\$0.06	\$20.26
National Median AS&U M & O Study 2005		\$0.24	\$42.98
National Median AS&U M & O Study 2007		\$0.01	\$3.30
<b>Supplies &amp; Materials - OFM Adjusted FY 2008 Budget</b>	\$4,694,000	\$0.29	\$93.88
National Median AS&U M & O Study 2005		\$0.33	\$80.32
National Median AS&U M & O Study 2007		\$0.28	\$52.71
<b>Other Services - OFM Adjusted FY 2008 Budget</b>	\$721,693	\$0.04	\$14.43
National Median AS&U M & O Study 2005		\$0.19	\$25.66
National Median AS&U M & O Study 2007		\$0.49	\$90.96
<b>Total O&amp;M Payroll - OFM Adjusted FY 2008 Budget</b>	\$21,379,964	\$1.33	\$427.60
National Median AS&U M & O Study 2005		\$1.83	\$446.65
National Median AS&U M & O Study 2007		\$2.51	\$433.09
<b>Maintenace&amp; Grounds Payroll - OFM Adjusted FY 2008 Budget</b>	\$6,795,661	\$0.42	\$135.91
National Median AS&U M & O Study 2005		\$0.67	\$156.93
National Median AS&U M & O Study 2007		\$0.95	\$155.59
<b>Total Non-Personnel Services - OFM Adjusted FY 2008 Budget</b>	\$6,428,612	\$0.40	\$128.57
National Median AS&U M & O Study 2005		\$0.81	\$160.14
National Median AS&U M & O Study 2007		\$0.85	\$156.26
<b>Total O&amp;M Payroll - OFM Adjusted FY 2008 Budget</b>	\$21,379,964		
<b>Total OFM Adjusted FY 2008 O&amp;M Budget</b>	\$27,808,576	\$1.73	\$556.17
National Median AS&U M & O Study 2005		\$3.40	\$755.75
National Median AS&U M & O Study 2007		\$4.14	\$736.32

<b>Total OPEFM O&amp;M FY 2009 Budget Required to Meet National Median</b>	
AS&U 2005 Study @ \$3.40/SF	\$54,740,000.00
AS&U 2007 Study @ \$4.14/SF	\$66,654,000.00

<b>Data</b>	
SF Maintained (including administrative and leased facilities)	16,100,000
DCPS Student Enrollment (SY 2007-2008)	50,000





Benchmarking Organizational Functions

December 2007

Management Structure	N/A	Florida		Illinois	Michigan	Ohio		Pennsylvania		Virginia		Maryland						California	
	District of Columbia	Orange County	Miami-Dade	Chicago	Detroit	Cleveland	Cincinnati	Philadelphia	Pittsburgh	Fairfax Co.	Arlington Co.	Baltimore City	Baltimore Co.	Howard Co.	Prince Georges Co.	Montgomery Co.	San Diego	LA Unified	
Chief Operating Officer		*	*		*		*			*				*				*	
Senior Vice President								*											
Associate Superintendent											*								
Executive Director	*								*			*	*	*	*	*			
Deputy Director																			
Energy Management							*	*		*						*			
Operations	*			*	*		*	*	*	*	*					*			
Maintenance	*		*	*	*		*				*					*			
Environmental	*				*		*	*		*					*	*			
Operations & Maintenance		*																	
Operations, Maintenance & Planning													*						
Operations, Maintenance & Environmental			*							*									
Capital Planning	*		*				*							*		*			
Design	*		*						*										
Construction			*						*		*			*		*		*	
Design & Construction							*												
Capital Planning & Design																			
Capital Planning, Design & Construction		*		*															
Contract Maintenance Services								*	*				*						
Support Services (Budget/Finance)	*							*					*		*			*	
Building Code & Compliance		*																	
Real Estate Management		*		*				*								*			
Risk Management		*		*	*									*					
Food & Nutrition		*		*	*								*						
Transportation/ Fleet Services													*						
Community Services Specialist														*					



## Benchmarking Facilities Profiles

December 2007

District Name	Chicago Public Schools, Illinois	
Total Students	420,982	
Total Facilities	623	
Total SF	85,876,289	
Total Staffing		
Total O&M Budget	\$116,532,304	\$1.36
Utilities Budget	\$83,300,000	
Multi-year CIP		

District Name	Detroit Public Schools, Michigan	
Total Students	1,121,131	
Total Facilities	269	
Total SF		
Total Staffing	1331	
Total O&M Budget	\$82,109,195	
Utilities Budget		
Multi-year CIP		

District Name	San Diego Unified School District, California	
Total Students	133,000	
Total Facilities	256	
Total SF	14,000,000	
Total Staffing		
Total O&M Budget	\$83,972,561	\$6.00
Utilities Budget		
Multi-year CIP		

District Name	Los Angeles Unified School District, California	
Total Students	700,000	
Total Facilities	873	
Total SF	72,000,000	
Total Staffing	5906	
Total O&M Budget	\$481,000,000	\$6.68
Utilities Budget	\$75,000,000	
Multi-year CIP		

District Name	Miami- Dade County Public Schools, Florida	
Total Students	361,550	
Total Facilities	367	
Total SF		
Total Staffing		
Total O&M Budget		
Utilities Budget		
Multi-year CIP		

District Name	Orange County Public Schools, Florida	
Total Students	176,236	
Total Facilities	175	
Total SF		
Total Staffing		
Total O&M Budget	\$130,609,759	
Utilities Budget		
Multi-year CIP	\$1,600,000,000	

District Name	Baltimore City Public School System, MD	
Total Students		
Total Facilities		
Total SF		
Total Staffing	839	
Total O&M Budget	\$84,618,152	
Utilities Budget	\$30,231,371	
Multi-year CIP	\$88,594,398	

District Name	Baltimore County Public Schools, MD	
Total Students	106,182	
Total Facilities	169	
Total SF	15.6 million	
Total Staffing	17000	
Total O&M Budget		
Utilities Budget		
Multi-year CIP	\$1,367,226,658	

District Name	Howard County Public Schools, MD	
Total Students		
Total Facilities		
Total SF		
Total Staffing		
Total O&M Budget	\$55,622,680	
Utilities Budget	\$17,588,880	
Multi-year CIP		

District Name	Prince Georges County Public Schools, MD	
Total Students		
Total Facilities		
Total SF		
Total Staffing		
Total O&M Budget		
Utilities Budget		
Multi-year CIP		

District Name	Montgomery County Public Schools, MD	
Total Students	137,798	
Total Facilities	200	
Total SF		
Total Staffing	24,000	
Total O&M Budget	\$84,997,816	
Utilities Budget	\$41,418,673	
Multi-year CIP	\$133,137,862	

District Name	Buffalo Public Schools, New York	
Total Students		
Total Facilities		
Total SF		
Total Staffing		
Total O&M Budget		
Utilities Budget		
Multi-year CIP		

District Name	Philadelphia Public Schools, Pennsylvania	
Total Students	185,000	
Total Facilities	330	
Total SF	38,000,000	
Total Staffing	2228	
Total O&M Budget	\$219,878,953	
Utilities Budget	\$30,000,000	
Multi-year CIP	\$2,048,058,075	

District Name	Pittsburgh Public Schools, PA (FY 07)	
Total Students	29,447	
Total Facilities	63	
Total SF		
Total Staffing	420.5	
Total O&M Budget	\$52,525,093	
Utilities Budget		
Multi-year CIP	\$187,683,296	

District Name	Fairfax County Public Schools, Virginia	
Total Students	164,843	
Total Facilities	236	
Total SF	25,000,000	
Total Staffing		
Total O&M Budget	\$97,300,000	
Utilities Budget	\$47,000,000	
Multi-year CIP	\$650,000	

District Name	Arlington County Public Schools, Virginia	
Total Students	33,752	
Total Facilities	39	
Total SF	3,900,000	
Total Staffing	376.25	
Total O&M Budget	\$7,798,969	
Utilities Budget		
Multi-year CIP	\$253,672,200	

District Name	Cincinnati Public Schools, Ohio	
Total Students		
Total Facilities		
Total SF		
Total Staffing		
Total O&M Budget		
Utilities Budget		
Multi-year CIP		

District Name		
Total Students		
Total Facilities		
Total SF		
Total Staffing		
Total O&M Budget		
Utilities Budget		
Multi-year CIP		

## V. TRANSITION STRATEGY

OPEFM will incorporate all elements of DCPS OFM. This includes employees, assets, offices/real estate, and files/records.

### A) Employees

To address all facets of the DCPS employee transfer, OPEFM has met with the DC Office of the Chief Technology Officer (OCTO), DC Department of Human Resources (DCHR), DC Office of Pay and Retirement Services (DCPRS), DCPS Office of Human Resources (OHR), Employee Transition Team members for the State Superintendent of Education (OSSE), and the DC Office of Risk Management (ORM). As a result, we hope to effect a seamless transition of OFM employees to OPEFM.

Currently, the DCPS OFM workforce is comprised of 13 functions or units:

UNIT / DIVISION	# of FTES
1. Accountability Unit	14 FTES
2. Administrative Oversight (General)	3 FTES
3. Contract Services Unit	10 FTES
4. Construction Unit	14 FTES
5. Contracting and Acquisitions	4.5 FTES
6. DCRA Liaison	1 FTE
7. Design Unit	10 FTES
8. Emergency Response Liaison	1 FTE
9. Environmental Health & Safety Unit	14 FTES
10. Maintenance Unit	126 FTES
11. Operations Unit	141 FTES
12. Strategic Funding Unit	1 FTE
13. Strategic Planning Unit	4 FTES
<b>TOTAL DCPS EMPLOYEES</b>	<b>342.5 FTES</b>

DCPS employee data is housed in the CAPPS payroll system. DC government has progressively migrated to Peoplesoft in greater capacities since 2001. OPEFM must conduct the following activities:

- Scrub or Correct CAPPs Personnel Data Scrub
- Complete a Position Classification and Compensation (Pay Parity) Study

- Complete a Workforce Competency Audit and Establish a Training Initiative Based upon Audit Findings
- Establish a Performance Management System

The CAPPS system has myriad data integrity issues which must be addressed prior to transferring employee data. Peoplesoft is the District's e-tool for human resource, timekeeping, and payroll administration. Before personnel can be transferred, OPEFM must establish and/or address the following:

- ***Establishing Transition Support*** - OPEFM will secure contract support in order to have dedicated staff to work solely on employee transitions, vet our process and progress to the unions, gather input from employees, compile personnel actions to address in changes in CAPPS, create a comprehensive report (spreadsheet) with the most accurate employee data, and serve as a liaison between OCTO, DCHR, DCPS OFM union organizations, and DCPS OHR for any and all issues preventing a smooth workforce transition into OPEFM.

Transition Support	Milestone / Deliverable	Due
MOU established with DCHR for classification	Deliverable: actionable MOU for classification and short-term Human Resource support	December, 2007
Contract Transition Support	Deliverable: Purchase order in place with contractor / vendor	December, 2007
MOU established to trans-source certain HR functions indefinitely (e.g. Benefits administration)	Deliverable: actionable MOU for continued Benefits, Orientation, and other HR support	February, 2008

- ***Personnel Data Compilation and Scrub***

Master Personnel List - OPEFM must create a Comprehensive (Master) Personnel List. Historically, this information has been difficult to compile because of the how the CAPPS payroll system is setup. As a result, OPEFM will derive its personnel data from the following sources:

- CAPPS Personnel Report from DCPS Office of Human Resources
- Disability (Workers Compensation) Claimant listing from the DC Office of Risk Management
- Potential "Returning" DCPS Facilities Personnel - Office of Employee Appeals and DCPS Office of General Counsel

<b>Creation of A Comprehensive (Master) Personnel Listing</b>	<b>Milestone/Deliverable</b>	<b>Timeline</b>
Master Personnel Listing from DCPS Office of Human Resources (including any remaining vacancies, if any)	Deliverable: CAPPS Data Dump (listing)	December, 2007
Listing: Workers Compensation Claimants from Office of Risk Management	Deliverable: additional DCPS Facilities Employees	December, 2007
Listing: Potential Returning Employees	Deliverable: List compiled from DCPS Office of General Counsel and from Office of Employee Appeals	December, 2007
Master Personnel List will be Comprehensive	Deliverable: Comprehensive DCPS Facilities Personnel List	December, 2007

*Employee Data Verification* - Position surveys will be disseminated to verify address, full name, DOB, current pay plan, series, grade, step, current benefits, position title, position duties (for compensation study and pay parity), life insurance, District Service Date, union affiliation (if any), and LEI dates.

*Benefits Open Season ends December 12, 2007* - Employees will be responsible for ensuring that any changes in health insurance designations be forwarded to the Transition Team during the CAPPS data survey.

<b>CAPPS Data Scrub</b>	<b>Milestone/Deliverable</b>	<b>Due</b>
DCPS OFM-wide employee data verification surveys disseminated	Milestone	December, 2007
Return of employee-verified or corrected data to Transition Team (including Benefit enrollment changes, as needed)	Milestone	December, 2007
End of Benefits Open Enrollment Season	Milestone	December, 2007
Correction of Comprehensive (Master) List	Milestone	December, 2007
CAPPS Data Cleanse <ul style="list-style-type: none"> <li>• Form 52s to DCPS OHR</li> </ul>	Deliverable	December, 2007
CAPPS data edited by DCPS OHR staff	Milestone	January, 2007
Follow-up, Quality Assurance <ul style="list-style-type: none"> <li>• Reprint of CAPPS Data from DCPS OHR</li> <li>• Verification of Data Revisions</li> </ul>	Milestone	January, 2007

– ***Position Classification and Compensation Reviews (Pay Parity)***

Since the designation of DCPS Career Service employees as Educational Service (EG) Employees in 1982, DCPS has not kept pace with industry and trade compensation packages and U.S. and regional cost of living increases. This has resulted in and perpetuated poor employee morale and diminished work performance of competent staff and a sustained inability or failure to attract and retain a talented workforce. With compensation and reward systems being the primary driver for encouraging performance excellence and a highly competent workforce, the DCPS workforce has suffered from negligible rewards for competence and inconsequential safeguards against poor performance. Pay Parity, incentives for workforce competencies and capabilities, and “Equal Pay for Equal Work” foci have been all but absent from DCPS for at least two decades when DCPS Career service employees were re-named. With that in mind, a concerted effort must be made to create a paradigm shift in order to encourage workforce and individual development and professional growth, to provide up front and clear communication on performance expectations on a formal basis, to create a culture of constructive feedback so that performance issues will be addressed immediately rather than over a span of 3-5 years, and to reward competence, responsiveness and high quality performance with market-aligned pay and reward packages.

Compensation Study	Milestone/Deliverable	Due
Review of (currently) non-union OFM positions, pay plans, grades, position description reviews (main benchmark: DC Office of Property Management (OPM) and DC Department of Consumer and Regulatory Affairs (DCRA))	Deliverable: Position Recommendations and Report for Educational (Career) Service employee transfer into OPEFM	January, 2008
Review of union OFM position descriptions, pay plans, grades, position description creation or reviews (main benchmarks: DC Office of Property Management (OPM) and DC Department of Consumer and Regulatory Affairs (DCRA))	Deliverable: Position Recommendations and Report for Supervisory and Non-supervisory Wage Grade Service employees into OPEFM	January, 2008
All employees have affiliated position descriptions, baseline for performance and certification expectations	Deliverable: All position descriptions complete	January, 2008
Delivery of Wage Grade Service employee position changes to respective unions	Milestone	January, 2008

– ***Personnel Job Class and Compensation Crosswalk (from DCPS to OPEFM)***

Because the current DCPS Educational Service and Wage Grade Service pay scales do not align with the Career Service, Professional, or Trade pay scales, OPEFM must review and realign staff to match: counterparts in OPM, DCRA, and federal classification standard considerations and to address compensation disparities between DCPS staff DC and federal government and the private sector. At the end of the Position Review, OPEFM will create a crosswalk for its employees from their current position title, pay plan, grade, step, and salary to their proposed DC position title, pay plan, grade, and salary.

DCPS to OPEFM Crosswalk	Milestone/Deliverable	Due
Compilation of Comprehensive Employee Compensation Crosswalk <ul style="list-style-type: none"> <li>from DCPS EG pay scales to DC Career Service or Management Supervisory Service pay scales</li> <li>from DCPS Wage Grade Service to recommended pay plan and grade in DC (Trade and Technical) pay scales</li> </ul>	Deliverable: Recommended Changes to DCPS Employee Position titles, pay plans, grades, steps; budgetary impact analyzed	January, 2008
<ul style="list-style-type: none"> <li>Review, comments, and/or approval of recommendations by OPEFM</li> <li>Review and comments to respective union(s), if applicable</li> </ul>	Milestone	January, 2008

– ***Switchover: Actual Personnel Data Transfer***

The Actual transition of OPEFM will occur in phases, with certain units being transferred over, addressing those issues, and then progressive transitioning other employees.

Switchover by Units	# employees or FTEs	Milestone/ Deliverable	Due
Accountability Unit Contracting and Acquisitions Construction Unit Design Unit DCRA Liaison Emergency Response Liaison	14 employees 4.5 employees 14 employees 10 employees 1 employee 1 employee	Deliverable: Successful Transfer of All employees corrected personnel and benefits data in Peoplesoft	February, 2008
Contract Services Unit Environmental Health and Safety Strategic Funding Strategic Planning	10 employees 14 employees 1 employee 4 employees	Deliverable: Successful Transfer of All employees corrected personnel and benefits data in Peoplesoft	February, 2008
Operations Unit (Boiler Plant Operations)	101 employees	Deliverable: Successful Transfer of All employees corrected personnel and benefits data into Peoplesoft	March, 2008

Operations (Building Services)	40 employees	Deliverable: Successful Transfer of All employees corrected personnel and benefits data into Peoplesoft	March, 2008
Maintenance (General and Grounds Maintenance)	70 employees	Deliverable: Successful Transfer of All employees corrected personnel and benefits data into Peoplesoft	April, 2008
Maintenance (Management and Mechanical and Electrical Maintenance Staff)	65 employees	Deliverable: Successful Transfer of All employees corrected personnel and benefits data into Peoplesoft	April, 2008

– ***Workforce Competencies and Training***

The Transition Team will complete a competency audit to review individual qualifications, competencies, education, and position-related certifications. This competency audit will serve as the springboard for determining workforce needs for training and for opportunities to increase workforce performance. Based upon the established position descriptions scheduled to be completed during the compensation review, the transition team will establish a matrix of position certification and competency standards, update employee personnel files with competencies and proofs of certifications, establish a database or spreadsheet with the due dates for recertification of all employees, and design a training program with budgetary considerations for OPEFM to create and maintain a trained and certified workforce.

OPEFM will use and incorporate position core competencies as a central common element in its performance management system. Each employee will be clear about how those competencies apply in his or her own performance and expectations.

<b>Workforce Competency Audit and Training Initiative</b>	<b>Milestone / Deliverable</b>	<b>Due</b>
Using established position positions, complete an agency-wide competency audit to establish baseline for training initiative needs	Milestone: Completion of all position descriptions including certification requirements, if any	February, 2008
Competency Standards and Audit: <ul style="list-style-type: none"> <li>Transition Team will create spreadsheet (database) with agency-wide competencies and certifications</li> <li>Transition Team will establish baseline requirements for trade certifications</li> </ul>	Deliverable Report: Competency Requirements and Facilities Workforce Audit	February, 2008
Training Requirements and Budget Impact	Deliverable: Report: Certification requirements, accepted vendor (training) list, and budget impact	March, 2008



### ***A. Creating and Sustaining a Culture of High Performance and Accountability***

To create a flexible yet highly accountable performance management system, we must create a culture of regular communication and constructive performance feedback both on informal and well documented levels. To create a performance management infrastructure is relatively easy – the District has well-established tools to document and monitor performance; however, to frame an organization that encourages and communicates high expectations will be much more difficult to create and even more difficult to sustain. Managers and supervisors will be expected to provide consistent and frequent input to employees in keeping with established performance metrics in employee annual performance plans, which must properly align and support each unit's performance metrics – these metrics, if properly aligned, will strengthen our foundation, OPEFM's mission, vision, and goals.

Introducing a more detailed performance management system is often a key element of implementing a more performance sensitive pay system. The OPEFM will ensure that managers and supervisors are thoroughly trained and that effective use of the new techniques became an important aspect of their own daily interactions and performance assessments.

An effective appraisal program for OPEFM employees will provide the following:

*Results-focus* - Employee performance plans hold employees accountable for achieving results appropriate to their level of responsibility.

*Feedback and Dialogue* - The appraisal program establishes a performance feedback process that ensures a dialogue between supervisors, managers, and employees throughout the year. It will substantiate, but not replace, work relationships based upon clear performance communications and consistent yet constructive performance feedback.

*Consequences* - The result of appraisal is used for recognizing top performers and addressing poor performance.

<b>Performance Management System</b>	<b>Milestone / Deliverable</b>	<b>Due</b>
Examination of Crosswalk for Managers in Management Supervisory Service (MSS) vs. Career Service employees.	Milestone	January, 2008
Completed Training: Performance Management Program (PMP) for all Career Service and MSS employees	Milestone	January, 2008
All Career Service and MSS employees will have draft performance plan in PMP system	Milestone	February, 2008
Finalized performance plans for all Career Service and MSS employees	Milestone	February, 2008

Completed Training: All Wage Grade Supervisors on providing constructive feedback and creating a culture of high performance expectations and constructive and consistent input	Milestone	February, 2008
All Wage Grade Employees will have Draft Performance Expectations (in much the same format as the PMP plans)	Milestone	March, 2008
Finalized performance plans for all Wage Grade Service Employees	Milestone	March, 2008
Mandatory 3 month performance evaluations	Deliverable	June, 2008
Fiscal year performance evaluations completed	Deliverable	October, 2008
Draft performance plans in place for FY09	Deliverable	November, 2008
Final (approved) Performance plans in place for FY09	Deliverable	November, 2008

## **B) Financial Resources and Management**

Similar to the agency as a whole, the financial function is to be nimble and able to respond quickly to agency executive management, the agency's vendors and to District's policymakers while maintaining appropriate and effective internal controls. Further, financial personnel should have and maintain "finger-tip" control of the agency's finances and, working collaboratively with OPEFM project managers, be able to quickly produce routine monthly, year-to-date, annual and ad hoc financial reports with appropriate narrative budget-to-actual variance analysis. Appropriate records and documentation should be maintained at all times.

- ***Prompt Payment and Its Far-Reaching Impact***

Expectations of the financial function, which are under the direction of the Office of the Chief Financial Officer, are that financial processes will be managed efficiently, in a pro-active manner that results in consistent prompt payments to our vendors and contractors while maintaining effective internal controls. Operationally, OPEFM defines prompt payment as payment within two weeks of receipt of an approved vendor/contractor invoice. The OCFO must work seamlessly with OPEFM's procurement, legal and project management functions to achieve this result. This is mission critical to the OPEFM as it seeks to increase competition among District and regional contractors, and as it seeks to continuously meet its 50% LSDBE participation requirement. OPEFM must establish and maintain a strong, positive image in the business and contractor communities that it pays quickly and accurately. Consistent prompt payment over time, reinforced with positive contractor experience, will encourage other general construction contractors currently not doing business with the District to participate in the school facilities modernization program. With additional firms competing with our current cadre of contractors, OPEFM and the District should realize savings from lower modernization costs.

Prompt payment should also have a positive impact on our LSDBE community by alleviating cashflow concerns that some LSDBE firms may have, thereby encouraging broader participation by LSDBE firms in the District's school facilities modernization program.

- ***FY 2008 Operating Budget***

With the passage of the "School Modernization Use of Funds Requirements Emergency Amendment Act of 2007", budget reprogrammings will be submitted to Council that transfers to OPEFM all assets, personnel, and funding authority for maintenance conducted by the DCPS's Office of Facilities Management (OFM). The DCPS OFM has had a historical local funds budget level equivalent to its FY 2008 pre-reallocated budget of \$33.5 million. After re-allocation by the DCPS Chancellor, OFM's FY 2008 operating budget was reduced to approximately \$23.2 million. The \$10.3 million removed from OFM would stay with the DCPS to finance those previously OFM performed services that will not be transferred to the OPEFM. While this DCPS programmatic re-allocation has occurred to OFM's operating

budget and services, there are still on-going discussions as to the division of roles and responsibilities between DCPS and OPEFM. The outcome of these discussions will affect the specific services and the related budget that will ultimately be transferred to OPEFM and included in the budget reprogramming requests to be submitted to the Council. It is hoped that these discussions will conclude in time for a January 15, 2008 submission of the reprogrammings to the Council.

For illustrative purposes only, using \$23.2 million as the amount of the prospective reprogramming, and assuming Council's approval, OPEFM's local funds operating budget will increase from its approved level of \$6.0 million to \$29.2 million. Since the budgetary increase is driven by the transfer of facilities maintenance services from the DCPS, the apparent increase in OPEFM's operating budget maintains a budgetary status quo for school facilities maintenance.

The baseline facilities maintenance operating budget is insufficient to keep school facilities in a good state of repair as evidenced by the scale of emergency summer school repairs and the FY 2008 school stabilization program which addressed some deferred maintenance. However, the OPEFM will thoroughly examine the transferred budget authority and the management of dedicated resources, particularly human resources, to identify opportunities to increase facility maintenance through better utilization of financial resources and higher workforce productivity. While it is uncertain how much better management of the same level budget dollars will increase the facilities maintenance service level, a larger, recurring local funds operating budget is definitely needed to meet minimum maintenance standards. An increase in the operating budget not only ensures: a) that scarce capital dollars are dedicated to the District's facilities modernization program and not re-directed to deferred maintenance, and b) that the District's substantial investment in past, current and future capital outlays are protected with an appropriate level of annual, routine maintenance. Adequacy of facilities maintenance funding is less of a concern for FY 2008 than it is for FY 2009, where it is a real issue. In FY 2008, the implementation of the \$120 million school stabilization program, financed with capital funds, will provide some immediate relief from the more pressing deferred maintenance issues.

- ***FY 2009 Operating Budget and the Need for an Enhanced Service Level***

Upon Council's approval of the above referenced \$23.2 million reprogramming, the OPEFM's FY 2009 baseline local funds budget would need to be adjusted accordingly from \$6.0 million to \$29.2 million to reflect the transfer of the school facilities maintenance function from the DCPS to the OPEFM. The Office of Budget and Planning has set FY 2009 OPEFM local fund budget target at \$6.0 million.

As earlier noted, a larger, recurring local funds operating budget is needed to meet minimum maintenance standards and protect the District's large investment in school facilities. As evidenced by the magnitude of capital project funded facilities repairs that occurred in the summer of 2007 in the amount of \$79.7 million (Accelerated Blitz \$31.1 million, Targeted Repairs \$27.0 million, Athletic Fields \$21.6 million) and that will occur in FY 2008 via the \$120.0 million school stabilization initiative,

deferred facilities maintenance is and will remain a significant issue. Deferred maintenance should be addressed in a systemic manner, rather than through periodic emergencies utilizing non-recurring funding sources. By dedicating additional recurring operating funds, OPEFM can initiate an increase in the facilities maintenance service level. This will provide safe and conducive learning environments for all schools while protecting the District's multi-billion dollar investment in school facilities. The funding enhancement would be invested in accounts for the acquisition of non-capital eligible goods and services. Services contracted with these monies would include: *inspection and repair services* for sprinklers, roofs, elevators, escalators, generators, fire alarms and bleachers; *maintenance and repairs* for security systems, pools, plumbing, electrical, and concrete & asphalt, and other general maintenance; *heating and cooling readiness*; *fire and health code abatement*; *air monitoring and environmental services*; and, *lead in water management*. Presently, there is no dedicated operating budget for these services. Also, some the funding enhancement would be earmarked for small purchases of maintenance related supplies, parts, tools, equipment and other materials.

OPEFM will work with the Administration during the FY09 budget development process to determine what the most appropriate funding level will be, ensuring that it is in line with national best practices. Currently DCPS spends approximately \$1.73 per square foot on maintenance, well below best practices and benchmarked against other urban school districts.

- ***Review of OFM's Business Processes***

As previously mentioned, OPEFM has retained the firm of TCBA to perform a financial and technology review of OFM to identify operational weaknesses and business risks OPEFM may inherit in the transition. OPEFM seeks to be pro-active and assertive in establishing sound business practices and strong management controls in its new area of responsibility as well as eliminate those practices which may be ineffective or add no value.

To repeat what has been previously stated, OFM is not a self contained business unit within DCPS. It is dependent upon DCPS central administration for critical services such as procurement services from the DCPS Office of Contracts and Acquisitions, human resources services from the DCPS Office of Human Resources, and financial services from the DCPS Office of the Chief Financial Officer. Since these central services impact OFM's performance, operational environment, and maintain some of its vital business records, TCBA will include these support services in its review. With the OFM review is not yet completed, OPEFM only has a preliminary report which is subject to update and adjustment. Since the preliminary report's findings are not final, OPEFM cannot yet speak authoritatively to the observed operational weaknesses. From an organizational point of view, OPEFM will be aggressive to quickly resolve, strengthen and fix any operation weaknesses noted in the review.

- ***Reconciliation of Amounts Owed to the USACE***

As of the date of this report, amounts are owed to the US Army Corps of Engineers (USACE) for prior fiscal years' work performed on DCPS facilities. A joint effort is presently underway to reconcile amounts owed the USACE and to reach a mutually agreed amount. OPEFM has assigned the firm of TCBA to assist in the reconciliation. Payment of agreed upon outstanding amounts may require reprogramming funds to USACE projects.

**C) Communications Plan**

OPEFM is instituting a multi-faceted communications plan to provide outreach to a number of audiences, including: parents, students, government officials, contractors and vendors, the larger business community as well as teachers and school administrators.

- ***OPEFM Website***

The OPEFM website will be completed in December 2007 and will provide information on each DC Public School. While the site will focus on new construction and substantial capital improvement projects, the public will also be able to access important school facility information and track OPEFM performance with fulfilling routine maintenance request. Additionally, the site will include a variety of energy efficiency, environmental health and safety reports to document ongoing building performance.

The site will also provide links to the District government and DC Public Schools main websites.

- ***Community Outreach***

OPEFM staff attend several community meetings each week to share information regarding ongoing school stabilization and modernization projects. The staff also coordinates School Improvement Team (S.I.T.) meetings with school administrators, parents and teachers to facilitate planning and then updates on new construction, modernization and large capital improvement projects.

OPEFM has worked diligently with other DC agencies, local utilities and area businesses to keep them abreast of school modernization activities and needs. Likewise, OPEFM has worked closely with DC City Councilmembers to keep them abreast of ongoing school construction and repair work. The OPEFM Executive Director has provided updates as requested and the OPEFM Communications staff has worked with Ward Councilmembers to plan a series of community meetings beginning in January 2008 to discuss projects in each ward.

## **D) Implementation Timetable**

**Implementation Timetable... *Continued***



**Implementation Timetable... *Continued***

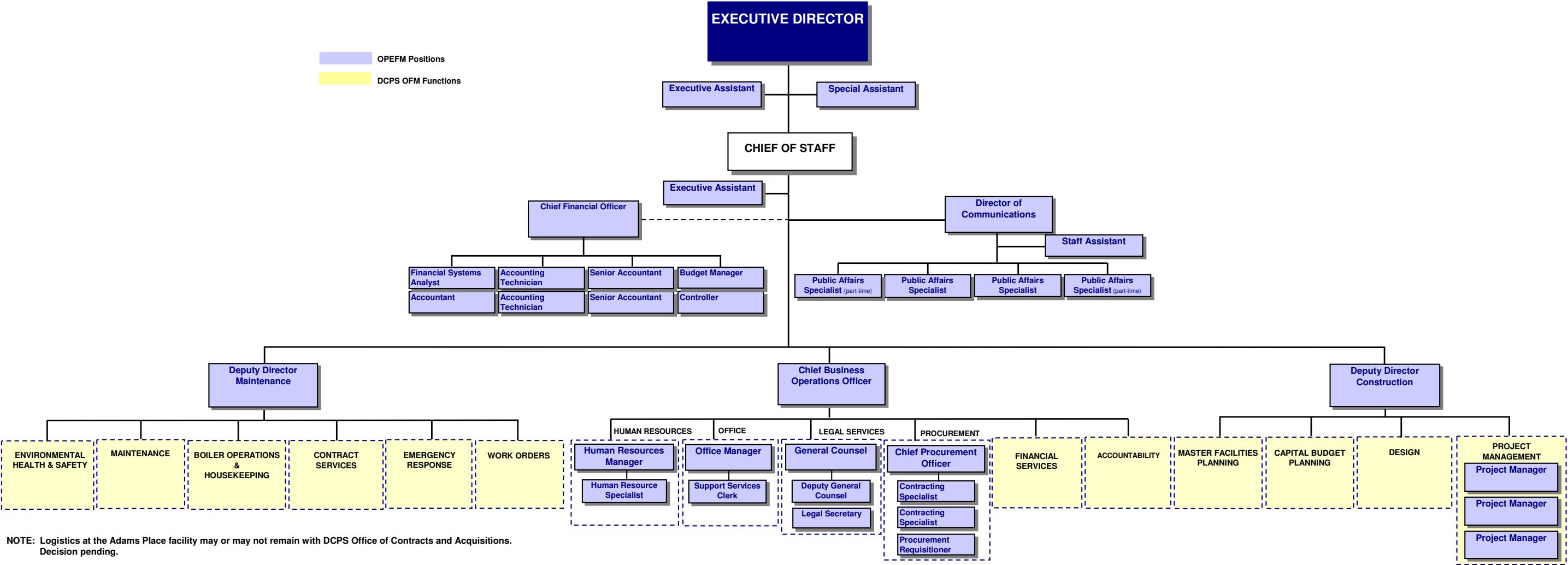
VI. OPEFM TRANSITIONAL STRUCTURE

A) Organizational Chart



TRANSITIONAL ORGANIZATIONAL STRUCTURE  
Proposed

GOVERNMENT OF THE DISTRICT OF COLUMBIA  
OFFICE OF PUBLIC EDUCATION FACILITIES MODERNIZATION



**B) Budget**

Office of Public Education Facilities Modernization  
Office of the Chief Financial Officer  
**Proposed FY 2009 Local Funds Operating Budget**  
**Agency Summary**

Category	Object Classes	FY 2008 Approved	FY 2008 Re- Allocated	FY 2009 Proposed	FY 2009 Proposed vs. FY 2008 Re- Allocated
01 - PERSONNEL SERVICES	0011 - REGULAR PAY - CONT FULL TIME	\$3,735,000	\$2,468,598	\$3,206,073	\$737,475
	0012 - REGULAR PAY Other - PART TIME	-	60,000	62,499	2,499
	0014 - FRINGE BENEFITS	765,000	493,720	568,890	75,170
	0015 - OVERTIME PAY	-	-	5,000	5,000
	<b>01 - PERSONNEL SERVICES</b>	<b>\$4,500,000</b>	<b>\$3,022,318</b>	<b>\$3,842,462</b>	<b>\$820,144</b>
02 - NON-PERSONNEL SERVICES	0020 - SUPPLIES AND MATERIALS		100,000	50,000	(50,000)
	0030 - ENERGY, COMM. AND BLDG RENTALS		67,500	60,000	(7,500)
	0031 - TELEPHONE, TELETYPE, TELEGRAPH, etc.		58,000	60,100	2,100
	0032 - RENTALS - LAND AND STRUCTURES		430,000	315,000	(115,000)
	0033 - JANITORIAL SERVICES		50,000	88,000	38,000
	0034 - SECURITY SERVICES		87,000	90,000	3,000
	0040 - OTHER SERVICES AND CHARGES		194,900	310,900	116,000
	0041 - CONTRACTUAL SERVICES - OTHER	1,500,000	1,636,282	575,538	(1,060,744)
	0070 - EQUIPMENT & EQUIPMENT RENTAL	-	354,000	218,000	(136,000)
	<b>02 - NON-PERSONNEL SERVICES</b>	<b>\$1,500,000</b>	<b>\$2,977,682</b>	<b>\$1,767,538</b>	<b>-\$1,210,144</b>
<b>Agency Totals</b>		<b>\$6,000,000</b>	<b>\$6,000,000</b>	<b>\$5,610,000</b>	<b>-\$390,000</b>

*Note: FY 2008 reflects start-up operations for OPEFM. Due to a one-time lag in personnel recruitment, vacancy savings are projected at 34% of the personal services budget, with the savings invested in one-time expenditures such the performance of a financial and management review of DCPS's OFM and leasehold improvements. FY 2009 vacancy saving or salary lapsed is budgeted at 5%. FY 2009 shows an overall reduction of \$390,000 due to the transfer 3 FTEs (General Counsel, Deputy General Counsel and Legal Assistant) to the Office of the Attorney General.*

## C) **Personnel Rules**

### **NOTICE OF EMERGENCY AND PROPOSED RULEMAKING**

The Director of the Office of Public Education Facilities Modernization (“OFM” or “Office”) gives notice of the adoption on an emergency basis of an amendment to Title 5 DCMR, by adding a new chapter 40, “Office of Public Education Facilities Modernization Personnel Rules.” The new chapter sets forth the personnel rules authorized by Section 702(b) of the Public Education Reform Amendment Act of 2007, effective June 12, 2007, D.C. Law 17-009 (the “Act”). This emergency rule was adopted on November [REDACTED], 2007, and became effective immediately on that date for the period from and after the effective date of the Act.

This emergency action is based on OFM’s need to add additional personnel in connection with the repairs OFM is undertaking to address life and safety issues at District of Columbia Public Schools.

The Director also gives notice of his intent to take final rulemaking action to adopt this amendment in not less than thirty (30) days from the date of publication of this notice in the D.C. Register.

Pursuant to section 702(b) of the Act, these proposed rules are also being submitted to the Council of the District of Columbia for review and approval. This rule will become effective upon Council approval, or forty-five (45) days after submission, if the Council has not disapproved the proposed rulemaking, and publication of the final rules in the D.C. Register. These emergency rules will expire upon the effective date of the final rules or within 120 days of the adoption of the emergency rules, whichever comes first.

Secs.

- 4000 Purpose and Application
- 4001 Administration
- 4002 Recruitment
- 4003 Relative and Veterans
- 4004 Temporary Help Service
- 4005 Consultant and Special Advisors
- 4006 Probationary Period and Reinstatement
- 4007 Eligibility for Employee Benefits
- 4008 Annual Leave and Holidays
- 4009 Sick Leave
- 4010 Change in Employee Status
- 4011 Leave of Absence

- 4012 Health and Life Insurance
- 4013 Retirement
- 4014 Workers' Compensation
- 4015 Responsibility for Salary Administration
- 4016 Job Description and Classification
- 4017 Transfers and Promotions
- 4018 Salary Increase
- 4019 Performance
- 4020 Corrective Action Process
- 4021 Termination
- 4022 Conflict of Interest
- 4023 Grievance Procedure
- 4024 Hazardous Weather Conditions

#### **4000 PURPOSE AND APPLICATION**

- 4000.1** The Office is an agency within the executive branch of the District of Columbia government. In accordance with the Act, the Office is exempt from the requirements of the District of Columbia Government Comprehensive Merit Personnel Act of 1978, effective March 3, 1979 (D.C. Law 2-139; D.C. Official Code §§ 1-603.01 et seq.), and has the authority to issue and implement its own personnel rules. The Office hereby adopts the following policies, rules and procedures governing recruitment, working conditions, benefits, terms of employment, salary administration and other personnel matters, notwithstanding, and in lieu of, the District of Columbia Comprehensive Merit Personnel Act, as amended.
- 4000.2** This chapter shall apply to all Office employees hired after the effective date hereof. Office employees hired prior to the effective date hereof may waive, in writing, coverage under any existing personnel laws and regulations and in lieu thereof opt for coverage under the provisions of the chapter.
- 4000.3** The provisions of this chapter shall not be construed so as to invalidate, rescind or modify the rights and obligations of Office employees hired prior to the effective date hereof.
- 4000.4** Except as otherwise provided herein, this chapter shall not apply to special advisors or consultants engaged by the Office.
- 4000.5** The Office is an equal opportunity employer and, in connection with recruitment, terms and conditions of employment, promotion, discipline, lay-off or

termination, rates of pay or other forms of compensation, and training, shall not discriminate on the basis of race, color, religion, national origin, sex, age, marital status, personal appearance, sexual orientation, familial status, family responsibilities, matriculation, political affiliation, or disability.

**4000.6** Where another statute or regulation is referenced in these regulations, such reference shall be to the most recent version and any amendments or revisions to such statute or regulation.

**4000.7** If any provision of this chapter is deemed invalid, void or unenforceable by a court of competent jurisdiction, this chapter shall be construed as though such provision does not appear herein. Any such finding by a court of competent jurisdiction shall not affect the validity of any other section, paragraph or sentence of this chapter.

#### **4001 ADMINISTRATION**

**4001.1** The Director, or his/her designee, shall have the authority and responsibility, consistent with the provisions of this chapter, to administer the provisions hereof.

**4001.2** The Director may adopt procedures and guidelines, consistent with this chapter, for the implementation of these provisions.

#### **4002 RECRUITMENT**

**4002.1** Except for the Director position, vacancies for permanent full-time positions shall be posted for a minimum of five working days before any job offers may be extended. Internal staff shall have an opportunity to apply and be considered for vacant positions.

**4002.2** When it is necessary to advertise externally to fill a vacant position, the following information shall be included in the advertisement:

- (a) Position Title;
- (b) Brief description of the work to be performed;
- (c) Minimum desirable skills and experience required;
- (d) Special skills required;
- (e) Salary information;
- (f) Information required to be submitted with application (e.g., resume, DC-2000, etc.); and
- (g) Equal employment opportunity language as required.

- 4002.3** The Director shall, from time to time, appoint a Personnel Officer, and nothing shall preclude the Director from appointing himself or herself as Personnel Officer. The Personnel Officer shall be responsible for the recruitment process of filling vacant or new positions. The Personnel Officer shall develop sources to assist managers and supervisors in obtaining the best qualified employees for the Office.
- 4002.4** The Personnel Officer shall accept and evaluate each employment application. The Personnel Officer and the Director shall be authorized to make salary commitments.
- 4002.5** Internal candidates shall complete an Office application when applying for positions. In addition, internal candidates shall undergo the same screening and interview process as all other candidates.
- 4002.6** A supervisor evaluating an applicant shall use criteria specifically related to the requirements for the position specified in the Personnel Vacancy Announcement. A supervisor shall select employees in a non-discriminatory manner in accordance with the Office's equal employment policies.
- 4002.7** Candidates who live in the District and who apply for a District residency preference shall be given five (5) points in the qualifications evaluation process.
- 4002.8** During the evaluation of an internal candidate, the selecting supervisor may review the candidate's personnel file and obtain a reference from the current supervisor. If any outside candidate is being evaluated, the Personnel Officer shall check the candidate's previous employment reference prior to a formal offer of employment.
- 4002.9** With the advance approval of the Director or his/her designee, the Office may reimburse expenses incurred in connection with relocating a newly-appointed staff member to Washington, D.C.
- 4002.10** The Office may reimburse interviewing expenses, if the expenses are approved in advance by the Director.

**4003 RELATIVES AND VETERANS**

- 4003.1** An officer/supervisor of the Office may not appoint, employ, promote or advance nor advocate for the appointment, employment, promotion or advancement of a relative in or to a position over which the officer/supervisor has supervisory authority.

**4003.2** For the purpose of this section “relatives” are defined as spouse, parent, parent-in-law, child, step-child, sister, brother, brother-in-law, sister-in-law, step-parent, niece, nephew, grandparent, or grandchild.

**4003.3** A permanent full-time employee who leaves a position with the Office to enter military service shall retain re-employment rights applicable under District or federal law in effect at the time of his/her separation.

#### **4004 TEMPORARY HELP SERVICE**

**4004.1** The Office may use temporary help services to assist during periods of heavy workload, to substitute for absent employees, or to work on projects of limited duration.

#### **4005 CONSULTANT AND SPECIAL ADVISORS**

**4005.1** To qualify as a consultant or expert, a person or organization shall demonstrate a high degree of professional expertise in a particular subject area. The Director or his/her designee shall approve the retention of consultants and experts.

**4005.2** The Office may engage consultants and experts on either a short- or long-term basis. Consultants and experts shall work out of their own facilities, and the Office shall not furnish support services, unless a specific agreement is otherwise negotiated with the consultant.

**4005.3** The Office shall hire consultants and experts to perform specific tasks on a fee-for-service basis.

#### **4006 PROBATIONARY PERIOD AND REINSTATEMENT**

**4006.1** The probationary period of employment for Office staff is one (1) year.

**4006.2** The Office shall evaluate an employee’s performance before the end of the probationary period. If the evaluation is satisfactory, the Personnel Officer of the Office shall remove the employee from probationary status and place him or her on permanent status.

**4006.3** If an employee fails to pass probation, the Office shall terminate his or her employment. Employees terminated during the probationary period shall not be eligible for severance pay.

**4006.4** For the purposes of this section, a reinstated employee is one who is terminated and is later rehired. Provided the reinstatement occurs within six months of resignation, reinstated employees shall receive full credit for prior employment



determining: annual leave accrual, eligibility for Office contributions to the retirement plan, or any other fringe benefits.

**4006.5** The Office shall treat reinstated employees as old employees for the purpose of determining: starting salaries, probationary period, performance evaluations, and eligibility for salary increases.

**4006.6** The Office shall treat employees reinstated after a period of six months as new employees for the purposes of determining the following:

- (a) Starting salaries;
- (b) Probationary period;
- (c) Performance evaluations; and
- (d) Eligibility for salary increases.

**4007 ELIGIBILITY FOR EMPLOYEE BENEFITS**

**4007.1** The following are the Office's employee benefits eligibility by type of employment status:

- (a) Permanent full-time;
- (b) Part-time;
- (c) Temporary employees with regular scheduled tours of duty; and
- (d) Temporary, intermittent employees.

**4007.2** Permanent full-time and part-time employees shall be eligible for all of the benefits.

**4007.3** Temporary employees with regular scheduled tours of duty shall be eligible for the following benefits:

- (a) Leave accruals for vacation;
- (b) Sick leave;
- (c) Holidays on scheduled workdays;
- (d) Social Security;
- (e) Workers' compensation; and
- (f) In-service training.

**4007.4** Temporary, intermittent employees shall be eligible for Social Security and workers' compensation.

## **4008 ANNUAL LEAVE AND HOLIDAYS**

- 4008.1** Annual leave shall be accrued from the first pay period of employment. However, annual leave shall not be taken until after the initial ninety (90) days, pending supervisor approval.
- 4008.2** Unearned annual leave shall not be advanced to employees except in emergency situations recommended by the supervisor and approved by the Personnel Officer or the Director.
- 4008.3** No more than 240 hours may be carried forward in an employee's annual leave account into a new calendar year. The Office's Personnel Procedures Manual shall cover specific accrual rates by category of employees.
- 4008.4** An employee shall obtain supervisor's approval prior to taking leave. The supervisor retains the right to refuse leave if the employee's absence would interfere with the functioning of the Office.
- 4008.5** The Office shall recognize the following paid holidays:
- (a) New Year's Day;
  - (b) Dr. Martin Luther King's Birthday;
  - (c) Washington's Birthday;
  - (d) DC Emancipation Day;
  - (e) Memorial Day;
  - (f) Independence Day;
  - (g) Labor Day;
  - (h) Columbus Day;
  - (i) Veterans Day;
  - (j) Thanksgiving Day; and
  - (k) Christmas Day.

## **4009 SICK LEAVE**

- 4009.1** Full-time permanent employees shall earn sick leave at the rate of four (4) hours per every 2 weeks. All permanent employees begin to accrue sick leave starting with the first day of employment. A full-time permanent employee earns no more than 104 hours of sick leave per year, provided the employee is not on leave without pay in excess of 80 hours during the year.

**4009.2** Part-time permanent employees earn sick leave at the same rate as full-time employees; however, the amount earned shall be prorated to correspond with the actual number of hours worked.

**4009.3** An employee may only use sick leave for personal illness. Employees who use all of their accrued sick leave and annual leave shall be placed on leave-of-absence-without-pay-status for the duration of the illness provided that advanced leave has not been approved as provided in section 4011.1.

**4009.4** An employee may accumulate an unlimited amount of carry over sick leave. Accrued sick leave shall not be paid to an employee upon termination of employment. However, employee shall have the option to convert accrued sick leave to add to years of service upon retirement.

#### **4010 CHANGE IN EMPLOYEE STATUS**

**4010.1** An employee shall be eligible for health and life insurance benefits when she or he changes from temporary to permanent status. In addition, the employee shall have eligibility for: service awards, annual and sick leave accrual, and retirement.

**4010.2** When an employee changes from permanent part-time to permanent full-time status while in the same position, the probationary period shall begin retroactively to the date she or he was first placed into the position.

#### **4011 LEAVE OF ABSENCE**

**4011.1** The Office may grant a medical leave of absence for 240 hours to a permanent full-time employee who has depleted his or her sick leave and annual leave if the following steps are taken:

- (a) The employee requests the leave of absence in writing;
- (b) The employee provides certification from a licensed physician stating the necessity for the leave of absence;
- (c) The employee provides a return-to-work authorization from the licensed attending physician; and
- (d) There is no history of sick leave abuse.

**4011.2** The Office may grant a general leave of absence without pay to the maximum of one (1) year (including extensions) to a regular full-time employee.

**4011.3** Office employees may take up to sixteen (16) weeks of unpaid leave over a twenty-four (24) month period for family or medical purposes as more fully defined in the Office's Personnel Procedures Manual.

- 4011.4** Approval of leave for maternity or paternity reasons shall be consistent with the Office's policy for granting leave for similar situations.
- 4011.5** An employee who has been summoned to report for jury duty shall be placed on administrative leave for that time period. However, the Office shall not compensate any such difference in salary or pay for jury duty served on Office holidays or non-working days.
- 4011.6** The Office may grant military leave of absence for a period not to exceed five (5) years. During this period, the employee's salary and benefit levels shall be frozen, and he or she shall be considered to be on extended leave of absence.
- 4011.7** In addition to other types of leave, the Director may grant administrative leave with pay for a variety of reasons to include: bereavement not to exceed three (3) days (immediate family consisting of spouse, children, siblings, parents, grandparents, and grandchildren), bad weather conditions or problems associated with physical conditions in the Office.

**4012 HEALTH AND LIFE INSURANCE**

- 4012.1** Procedures established for administering the health benefits program within the Office shall be consistent with applicable law and regulations.
- 4012.2** Procedures established for administering the life insurance benefits program within the Office shall be consistent with applicable law and regulations.

**4013 RETIREMENT**

- 4013.1** Procedures established for administering the retirement benefits program within the Office shall be consistent with applicable law and regulations.
- 4013.2** The Office shall deduct Social Security contributions from each employee's paycheck in accordance with federal law. The amount of the deduction shall be in accordance with the current federal regulations. The employee's deduction shall be matched with equal contribution by the Office.

**4014 WORKERS' COMPENSATION**

- 4014.1** Each employee on the payroll of the Office shall be covered by either a workers' compensation policy or an appropriate self-insurance policy that is consistent with applicable law. Benefits shall be payable in accordance with District of Columbia laws.

**4014.2** Each employee injured on the job shall report the incident to their supervisor and Personnel Officer as soon as possible.

**4014.3** Permanent employees on workers' compensation leave shall be entitled to every benefit and across-the-board adjustment available to other staff members.

**4014.4** The Office shall require a doctor's certification for the employee to resume work following a workers' compensation injury.

**4015 RESPONSIBILITY FOR SALARY ADMINISTRATION**

**4015.1** The Personnel Officer shall be responsible for the administration and maintenance of the Office's salary administration program. The responsibilities of the Personnel Officer shall include the following:

- (a) Conducting salary surveys;
- (b) Establishing pay levels, job descriptions and job classifications subject to the approval of the Director; and
- (c) Monitoring all personnel actions and pay practices to ensure compliance with Office policies and federal and local laws.

**4015.2** Subject to any limitations imposed by applicable law and regulations, the Personnel Officer shall recommend salary ranges based upon periodic surveys of comparable positions within other organizations in the Washington Metropolitan area.

**4015.3** Salary ranges for each job classification include a minimum and maximum salary. Ordinarily, the Office shall hire new employees at or near the minimum salary level for their position. However, in some cases, the Office may establish a starting salary at a higher level in order to successfully recruit the best qualified applicant for certain positions identified by the Personnel Officer.

**4015.4** The Director may authorize an increase to the Office salary administration program. Employees shall have completed at least ninety (90) days service in order to be eligible for increase in pay.

**4016 JOB DESCRIPTION AND CLASSIFICATION**

**4016.1** The Personnel Officer shall be responsible for periodically updating job descriptions based upon changes in job content. Any Office employee may obtain a copy of his or her job description upon request.

**4016.2** The Personnel Officer shall assign each position to a specific classification.

**4016.3** For the purposes of this section, a reclassification means redescription of an existing position which is no longer properly classified because of substantial changes in the duties and responsibilities assigned to the position.

**4016.4** Reclassification procedures shall be outlined in the Personnel Procedures Manual of the Office.

#### **4017 TRANSFERS AND PROMOTIONS**

**4017.1** An employee transferred to a higher grade position is a promotion. A promotion shall entitle an employee to a salary increase in the amount equivalent to no less than 10% of the employee's current salary or the minimum salary for the classification of the new position, whichever is greater.

**4017.2** An employee may voluntarily request a transfer to a lower position. If the employee's salary exceeds the ceiling for the new position, the employee's salary shall be adjusted to the ceiling amount.

**4017.3** When an employee is reassigned at the convenience of the Office to a lower classified position, the employee's salary shall, if possible, remain the same. If the maximum salary range of the lower position does not include the employee's current salary, the employee will be assigned the highest possible salary in the lower position.

**4017.4** Each employee who is transferred to another position in a different line of work (except those transferred at the convenience of the Office) shall undergo a new probationary period.

**4017.5** The Personnel Officer and the Director shall authorize and implement procedures for promotions.

**4017.6** An employee who is temporarily detailed to assume the responsibilities of a higher classified position shall be eligible for a higher salary level for the temporary period. The Officer shall adjust the salary after two (2) full pay periods have elapsed; provided, however, no adjustment in connection with this section shall be effective for a period of more than two (2) years.

#### **4018 SALARY INCREASE**

**4018.1** An employee occupying a permanent position who has not reached the maximum step of pay in his/her salary schedule, is entitled to the next higher rate of pay in the salary schedule provided:

- (a) The employee has completed the required waiting period;

- (b) The employee has performed at an acceptable level of competence based on the most recent performance rating; and
- (c) The employee has not received an equivalent increase during that period.

**4018.2** Subject to the availability of funds, the Office may grant a quality increase in salary equal to the next higher step in the salary schedule of an employee occupying a permanent position who substantially exceeds normal requirements in the most important functions (duties) of his/her job. Not more than one quality increase may be granted to the same employee during any 26-week period. Quality increases are in addition to within-grade step increases. Therefore, an employee who receives a quality increase does not thereby begin a new waiting period to meet the time requirements for a next within-grade step increase.

**4018.3** The Personnel Officer shall determine which employees are covered by the overtime provisions of the Fair Labor Standards Act. The Director or his/her designee(s) shall approve all overtime work.

**4018.4** The Director or his/her designee shall grant compensatory time accrual and leave to employees who are exempted from the Fair Labor Standards Act overtime provisions.

#### **4019 PERFORMANCE**

**4019.1** The Office shall evaluate each employee during his or her probationary period and at least once each year thereafter.

**4019.2** During the performance evaluation process, a supervisor may notify a non-probationary employee that the overall level of his or her performance is unsatisfactory. If improvement is not forthcoming following the evaluation, the supervisor shall take corrective action pursuant to section 4020.

**4019.3** After an employee's written performance evaluation has been conducted, a supervisor may recommend a merit increase for the employee. Employees shall have received at least an outstanding performance rating to be eligible for a merit increase.

**4019.4** The Director may give an incentive award to eligible employees who have demonstrated superior performance.

## **4020 CORRECTIVE ACTION PROCESS**

**4020.1** Corrective actions are formal actions of the Office. The corrective action process consists of a number of steps that may or may not be followed in sequence, including, but not limited to, the following:

- (a) Oral Reprimand;
- (b) Written Reprimand;
- (c) Suspension; and
- (d) Dismissal or Termination.

**4020.2** Disciplinary leave (suspension) may be given to an employee under one of the following two sets of circumstances:

- (a) As a follow-up to a written notice of unsatisfactory performance in the corrective action process; and
- (b) As an interim measure following an act of serious misconduct or breach of organizational rules or regulations. The Director or his/her designee shall review and approve every disciplinary action.

**4020.3** The Office shall terminate an employee who has been charged with serious misconduct or neglect of duty. The Director or his/her designee shall approve every involuntary termination, except those involving probationary employees.

**4020.4** Examples of serious misconduct or neglect of duty include, but are not limited to, the following:

- (a) Insubordination;
- (b) Fighting on the job or using abusive or profane language;
- (c) Possession of controlled substances;
- (d) Intoxication;
- (e) Misrepresentation in securing employment or falsification of official records;
- (f) Breach of confidentiality, theft or dishonesty;
- (g) Failure to follow organizational rules, policies and procedures;
- (h) Sexual harassment;
- (i) Tardiness, poor attendance or lack of dependability;
- (j) Discourteous treatment of the Office clients, the public, supervisors, or other employees;



- (k) Misuse, mutilation or destruction of Office property or funds; and
- (l) Failure of good behavior during duty hours which is of such a nature that it causes discredit to the Office.

## **4021 TERMINATION**

- 4021.1** The Office may terminate an employee for a variety of reasons relating to his or her job. Examples of reasons for termination include, but are not limited to, the following:
- (a) Unsatisfactory job performance;
  - (b) Abandonment of position;
  - (c) Reduction-in-force;
  - (d) Serious misconduct;
  - (e) Neglect of duty; and
  - (f) Failure to successfully complete probationary period.
- 4021.2** The Office may elect to reduce the level of positions for a variety of reasons including, but not limited to, financial consideration, restructuring of work unit, or termination of segments of the organization's services or operations. The Office shall give employees terminated, because of reduction-in-force, a minimum of thirty (30) days written notice.
- 4021.3** An employee who fails to report to work or to notify his or her supervisor of a pending absence for five (5) consecutive days shall be deemed to have abandoned and voluntarily resigned his/her position. His or her employment shall be terminated as of the close of business of the fifth day of absence.
- 4021.4** Except for terminations during a probationary period, or in cases involving serious misconduct or neglect of duty, an employee shall not be terminated involuntarily until procedures for corrective action are employed, pursuant to section 4020.
- 4021.5** The supervisor of the employee shall present written notice of termination to the employee at least two (2) weeks prior to the effective date of such termination. The written notice shall state the reasons for the action and the effective date of termination.
- 4021.6** The Office shall not be obligated to provide two (2) weeks notice to any employee where the termination occurs during the initial probationary period.

**4021.7** Even in terminations which do not involve serious misconduct or neglect of duty, the supervisor may, in his or her sole discretion, determine that it would be in the best interests of the employee not to remain on the premises during the two (2) week notice period. Where such determination is made, the employee shall be eligible for payment upon receipt of notice, as outlined in the Personnel Procedures Manual of the Office.

**4021.8** Severance pay shall be provided only to those employees who are terminated as a result of a reduction-in-force.

**4022 CONFLICT OF INTEREST**

**4022.1** Office employees shall not participate in transactions that may result in conflict, or apparent conflict, between the private interests of the employee and the interests of the Office. Specifically, no employee shall do any of the following:

- (a) Have a direct or indirect financial interest that conflicts substantially, or appears to conflict substantially, with the employee's responsibilities for the Office;
- (b) Engage directly or indirectly in financial transactions as a result of or primarily in reliance upon information obtained as a result of performing services for the Office as an employee; or
- (c) Solicit or accept, directly or indirectly, any gift, gratuity, favor, compensation, or any other thing of significant monetary value from any person, corporation, or other entity that has, or is seeking to obtain contractual or other business or financial relationships with the Office.

**4022.2** Employees may participate in a political campaign on their own time by using either annual leave or leave without pay. Employees shall not use organization time, facilities, resources or their personal affiliation with the Office to participate in campaign activities.

**4022.3** To the extent permitted by applicable law, employees may engage in professional activities and ventures outside the organization provided that the following conditions are met:

- (a) Each independent outside professional activity shall be conducted on the employee's own time without the use of organizational facilities, funds, supplies, staff or resources; and
- (b) Each outside professional service is not in conflict with any activity or policy of the Office.

- 4022.4** Personal visits by friends or relatives during working hours shall be kept to a minimum. Employees shall not bring their children to the office as a substitute for other child care arrangements.
- 4022.5** The official hours of work of the organization shall be 8:30 a.m. to 5:00 p.m., Monday through Friday, unless otherwise designated and approved by the Director, for a total of 40 regular hours in a work week or a total of 2,080 regular hours in a year.
- 4022.6** Employees who work at least eight (8) hours in a day shall be entitled to take a one (1) hour lunch break. Employees who work fewer than eight (8) hours per day shall be entitled to a lunch break at the discretion of their immediate supervisor.
- 4022.7** Employees under the age of eighteen (18) shall not be employed by the Office unless, and until, the employee had procured a work permit that conforms to the requirements of D.C. Code § 32-208.

**4023 GRIEVANCE PROCEDURE**

- 4023.1** All regular full-time employees who have satisfactorily completed the initial probationary period shall be covered by complaint procedures as indicated in the Office's Personnel Procedures Manual.
- 4023.2** Employees shall initially seek an administrative remedy through the complaint procedures outlined in the Personnel Procedures Manual prior to seeking a remedy from any court of competent jurisdiction or other third party.
- 4023.3** The procedure specified in the Office's Personnel Procedures Manual shall be strictly adhered to by the grievant.
- 4023.4** The Office's complaint procedure shall cover complaints concerning working conditions, the application of discipline, and the application, enforcement, and interpretation of Office policies.
- 4023.5** The objective of the complaint procedure is to equitably resolve employee's complaints at the earliest stage possible and at the lowest supervisory level possible. In keeping with that objective, the procedures shall be conducted in a conciliatory manner. Whenever possible, consideration shall be given to prompt resolution of employee's complaints by informal discussion with managers or division directors.

#### **4024 HAZARDOUS WEATHER CONDITIONS**

- 4024.1** When necessary, the Office may close due to hazardous weather conditions. The Director may close the Office for operations when weather conditions impede safe travel to work. The Office Personnel Procedures Manual shall describe the process for notifying employees of work schedules under hazardous conditions.

Persons desiring to comment on these proposed rules should submit comments in writing to Allen Y. Lew, Director, Office of Public Education Facilities Modernization, 2400 East Capitol Street, SE, Washington, D.C. 20003 no later than thirty (30) days after the date of publication of this notice in the D.C. Register. Copies of these proposed rules may be obtained between 8:30 a.m. and 5:00 p.m. at the address stated above.

## **D) Procurement Rules**

### **NOTICE OF EMERGENCY AND PROPOSED RULEMAKING**

The Director of the Office of Public Education Facilities Modernization (“OFM” or “Office”) gives notice of the adoption on an emergency basis of an amendment to Title 5 DCMR, by adding a new chapter 39, “Office of Public Education Facilities Modernization Procurement Rules.” The new chapter sets forth the procurement rules authorized by Section 702(b) of the Public Education Reform Amendment Act of 2007, effective June 12, 2007, D.C. Law 17-009 (the “Act”). This emergency rule was adopted on August 10, 2007, and became effective immediately on that date for the period from and after the effective date of the Act.

This emergency action is based on OFM’s need to undertake repairs to address life and safety issues at District of Columbia Public Schools.

The Director also gives notice of his intent to take final rulemaking action to adopt this amendment in not less than thirty (30) days from the date of publication of this notice in the *D.C. Register*.

Pursuant to section 702(b) of the Act, these proposed rules are also being submitted to the Council of the District of Columbia for review and approval. This rule will become effective upon Council approval, or forty-five (45) days after submission, if the Council has not disapproved the proposed rulemaking, and publication of the final rules in the *D.C. Register*. These emergency rules will expire upon the effective date of the final rules or within 120 days of the adoption of the emergency rules, whichever comes first.

Secs.

3900	General
3901	Applicability
3902	Contracting Officials
3903	Chief Contracting Officer
3904	Delegation of Authority to Contracting Officers
3905	Authority and Duties of Contracting Officer
3906	Contractor Qualification Requirements
3907	Responsibility
3908	Organizational Conflicts of Interest; Disqualification
3909	Procurement Planning and Publicity
3910	Market Research
3911	Preparing Solicitations
3912	Publicizing Procurement Opportunities
3913	Contract Types
3914	Fixed-Price Contracts

3915	Cost Reimbursement Contracts
3916	Basic Ordering Agreements
3917	Time and Materials Contracts and Labor Hours Contracts
3918	Contracting Procedures
3919	Contracting Procedures Generally
3920	Sealed Bidding
3921	Competitive Negotiation
3922	Simplified Contracting Procedures
3923	DC Supply Schedule; GSA Schedule
3924	Sole-Source Contracting Procedures
3925	Contract Administration
3926	The Contracting Officer's Responsibility for Contract Administration
3927	Payment Requests
3928	Exercising the Contract Options
3929	Contract Modifications
3930	Contract Termination
3931	Contract Documentation
3932	Transfer of Contracts
3933	Disputes
3934	Protests
3935	Applicable Laws

## **3900 GENERAL**

**3900.1** The Office is an agency within the executive branch of the District of Columbia government. In accordance with the Act, the Office is exempt from the requirements of the District of Columbia Procurement Practices Act of 1985, effective February 21, 1986 (D.C. Law 6-85; D.C. Official Code § 2-301.01 *et seq.*), and has the authority to issue and implement its own procurement rules. The Office's general mission is to ensure that the public education facilities in the District of Columbia are modernized in a timely and cost effective manner and consistent with the Facilities Master Plan referred to in Section 704 (6) of the Act.

**3900.2** The Director of the Office is authorized to enter into contracts on behalf of the Office and may delegate that authority in accordance with these rules.

**3900.3** These procurement rules are for the benefit of the Office, and are not intended to confer any rights or benefits on third parties. The principal purposes of these rules are to ensure that the Office's procurement activities:

- (a) are carried out in a fair and objective manner that promotes confidence in the Office's integrity; and
- (b) produce reasonable value and reasonable results for the Office, as determined by its Director.

**3900.4** These rules are intended to encourage participation by Local, Small and Disadvantaged Business Enterprises (LSDBEs), in accordance with the Small, Local, and Disadvantaged Business Enterprise Development and Assistance Act of 2005, Title II, Subtitle N, of the Fiscal Year 2006 Budget Support Act of 2005, D.C. Law 16-33, effective October 20, 2005. The Office's goals include expanding and retaining disadvantaged businesses located within the District.

**3900.5** The Director may waive the applicability of any provisions in these rules that are not specifically required by statute if the Director finds in writing that:

- (a) such waiver is in the best interest of the Office;
- (b) such waiver is not inconsistent with fair, competitive, and transparent procurement practices; and
- (c) such waiver is technical in nature and would not alter the substantive business terms of a procurement after proposals have been received.

### **3901 APPLICABILITY**

**3901.1** These rules apply to the procurement of goods or services, including construction services, by the Office:

- (a) whether through purchase or lease; and
- (b) whether the goods or services are already in existence or must be developed.

A procurement of goods or services does not include any goods or services that the Office may acquire as a gift, on a pro bono basis, or pursuant to agreements with any agency of the District or federal governments.

**3901.2** These rules do not apply to:

- (a) the purchase or lease of real property by the Office;
- (b) developmental agreements awarded by the Office; or
- (c) the disposition of real or personal property by the Office.

In addition, these rules do not apply to retaining individuals to serve as on-site consultants for specific, time-limited assignments.

### **3902 CONTRACTING OFFICIALS**

#### **3903 CHIEF CONTRACTING OFFICER**

**3903.1** *The Director shall serve as the Office's Chief Contracting Officer ("CCO"). The CCO shall have overall responsibility for supervising the Office's procurement activities. The CCO shall have the authority to award any contract.*

### **3904 DELEGATION OF AUTHORITY TO CONTRACTING OFFICERS**

**3904.1** *The CCO shall have the authority to delegate his or her contracting authority to employees of the Office, who shall be designated as Contracting Officers. Any such delegation shall be in writing, and shall specify any limits on a Contracting Officer's delegated authority (e.g., limits on the dollar value of contracts the individual is authorized to award). In no case can a Contracting Officer's authority exceed the CCO's authority.*

**3904.2** *In delegating his or her contracting authority, the CCO shall ensure that each delegated Contracting Officer has the experience, knowledge, and judgment necessary to fulfill the duties of a Contracting Officer, including a solid understanding of the Office's procurement rules. Subject to compliance with these rules, Contracting Officers have wide latitude to exercise business judgment in conducting procurements. Consequently, the ability to exercise that discretion wisely and responsibly is an important job qualification. In addition, the CCO shall ensure that Contracting Officers periodically receive training to strengthen and update their skills and knowledge concerning procurement matters.*

### **3905 AUTHORITY AND DUTIES OF CONTRACTING OFFICER**

**3905.1** Only the CCO or a Contracting Officer shall have the authority to award, modify, or terminate contracts; provided, however, that prior to terminating any contract, the Contracting Officer shall first obtain the approval of the CCO. As necessary or appropriate in exercising his or her authority, a Contracting Officer shall request and consider the advice of specialists in auditing, law, technical disciplines, and other relevant fields.

**3905.2** A Contracting Officer for a particular procurement shall be responsible for:

- (a) making any determination or findings that may be required in connection with that procurement;
- (b) ensuring that all statutory and regulatory requirements that apply to the procurement have been identified and observed;
- (c) ensuring that all necessary preconditions to contract award have been satisfied before the contract is awarded;
- (d) maintaining the contract file, which serves as the repository for all required documentation concerning the procurement and any resulting contracts; and
- (e) ensuring that all offerors participating in a procurement receive fair and impartial treatment.



## **3906 CONTRACTOR QUALIFICATION REQUIREMENTS**

**3906.1** To be eligible to receive a contract from the Office, a prospective contractor must satisfy two basic qualification requirements. Specifically, the prospective contractor must:

- (a) be responsible; and
- (b) not be disqualified on the basis of conflicts of interest (either personal or organizational) or related ethical concerns.

These issues are disclosed sequentially below.

## **3907 RESPONSIBILITY**

**3907.1** To receive a contract from the Office, a contractor must be “responsible.” This means that the contractor:

- (a) has (or can obtain) the financial, technical, and organizational skills and resources, and the facilities and equipment, necessary to perform the contract in accordance with its terms;
- (b) has a satisfactory performance record, and a satisfactory record of integrity and business ethics;
- (c) is not suspended, debarred, or otherwise ineligible to receive contracts from the District government or the federal Government;
- (d) meets any other qualification criteria that may be imposed by applicable laws or regulations; and
- (e) shall provide adequate evidence that it has paid and filed all applicable District of Columbia taxes and tax returns.

The Contracting Officer shall make a written determination if the contractor is found to be non-responsible. Depending on the level of formality of the contract and at the Contracting Officer’s discretion, the Contracting Officer may make a written determination if the contractor is found to be responsible.

**3907.2** In evaluating a prospective contractor’s responsibility, a Contracting Officer may request information from the contractor, and may also consider information available from other sources. Where necessary, the Contracting Officer may also perform a “pre-award survey” involving interviews with contractor personnel or visits to the contractor’s facilities. Information on the capabilities and suitability of proposed subcontractors also may be considered in evaluating responsibility.

## **3908 ORGANIZATIONAL CONFLICTS OF INTEREST; DISQUALIFICATION**

**3908.1** The Office intends to avoid even the appearance of conflict of interest or impropriety in connection with its procurement activities. Thus, even if a prospective contractor is responsible, the CCO has the discretion to disqualify the contractor (or to take other

appropriate measures) based on conflicts of interest or other ethical considerations. Such concerns may authorize the Contracting Officer:

- (a) to disqualify a contractor at any point during a procurement;
- (b) to rescind or terminate a contract subsequent to contract award; or
- (c) to take other appropriate corrective measures, such as canceling a pending solicitation and initiating a new procurement; provided, however, that prior to taking any such action, the Contracting Officer shall first obtain the approval of the CCO.

Any determination by the CCO to take such corrective measures shall be made in writing and included in the contract file. The circumstances in which the need for such corrective measures may arise are described below.

**3908.2** The ethical considerations that may authorize disqualification or other corrective measures go beyond violations of any ethics and conflict of interest rules the Office may from time-to-time publish and the prospective contractor's ethics and conflict of interest rules, if any. The Contracting Officer may properly elect to adopt corrective measures whenever necessary to avoid the appearance of impropriety or otherwise eliminate doubts about the integrity and fairness of a procurement. For example, situations in which corrective measures might be warranted include (but are not limited to):

- (a) cases where a director or employee of the Office involved in a procurement had a relationship with a contractor that fell outside the Office's recusal rules, but nonetheless raised questions about the procurement's integrity;
- (b) cases where a prospective contractor received preferential treatment in relation to its competitors;
- (c) cases where a prospective contractor hired a former director or employee of the Office who was privy to non-public information about the procurement, and involved that individual in its proposal preparation efforts; or
- (d) cases where there is clear evidence suggesting collusive bidding or similar anti-competitive practices by prospective contractors.

**3908.3** "Organizational conflicts of interest" also may warrant disqualification or other corrective measures. Organizational conflict of interest means a situation in which a contractor:

- (a) may be unable to render impartial and objective assistance or advice to the Office; or
- (b) may have an unfair advantage over potential competitors.

Organizational conflicts of interests can arise in a variety of circumstances. For example, a contractor that develops the technical specifications for an item that will be the subject of a future procurement may have an incentive to develop specifications favoring its own products unless it is barred from participating in the future procurement. Another example is a case where a contractor performs services for the Office that require access to non-public information (e.g., proprietary data of other companies), and could therefore gain an unfair advantage over competitors in future procurements.

**3908.4** A number of measures may be appropriate for eliminating or mitigating organizational conflicts of interest, and the CCO has broad discretion to select the approach that is most suitable in any particular case. For example, a contract to assist the Office in developing requirements for a future procurement ordinarily should include a clause prohibiting the contractor from participating in the future procurement. A contract in which the contractor gains access to proprietary information on other companies (or non-public information on the Office's procurement plans) should include an appropriate clause that prevents the contractor from using such information in any manner that might give it an unfair advantage. In any particular case, the mechanism adopted to handle an organizational conflict should be designed to prevent:

- (a) the existence of conflicting roles that might bias a contractor's judgment;  
and
- (b) unfair competitive advantage.

## **3909 PROCUREMENT PLANNING AND PUBLICITY**

### **3910 MARKET RESEARCH**

**3910.1** Before issuing a solicitation or making a purchase, the Office must first:

- (a) estimate the likely cost of the proposed procurement and ensure that adequate funds are available; and
- (b) conduct appropriate market research.

**3910.2** Market research is designed primarily to familiarize the Office with the market for the goods or services it seeks to acquire, in order to develop an appropriate strategy for conducting a prompt and efficient procurement that promotes reasonable competition between qualified firms. The extent of market research will vary, depending on factors such as urgency, the size and complexity of the proposed procurement, and the Office's existing knowledge of the market based on its (or its key personnel's) past experience in procuring similar goods or services. Market research generally should focus on obtaining information such as the following, to the extent it is relevant to the particular procurement and not already known to the Office:

- (a) customary practices in the relevant market;
- (b) the prospective sources that may be able to supply the goods or services;
- (c) the opportunities for participation by firms that qualify as LDBEs;

(d) the benchmarks available to evaluate the likely cost of the procurement and the reasonableness of prices or costs proposed by prospective contractors; and

(e) the requirements of any laws or regulations unique to the procurement.

**3910.3** In conducting market research, the Office may solicit information from prospective sources on matters such as their interest in the potential procurement, the characteristics and costs of their products or services, their customary practices, and their knowledge of the industry generally. Such information may be solicited by requesting interested parties to submit written information (e.g., by posting a notice on the Internet seeking information pertinent to the proposed procurement), through meetings or telephone contacts, or by distributing and seeking comments on a draft solicitation.

**3910.4** In addition to soliciting information from prospective contractors, the Office may also obtain information from a variety of other sources. For example, price information that can assist in estimating the likely cost of a procurement and in evaluating price reasonableness is frequently available from sources such as catalogs, internet sites, or records of past procurements.

## **3911 PREPARING SOLICITATIONS**

**3911.1** Following the conduct of market research, the Contracting Officer shall make a determination as to which procurement methodology specifically identified in these regulations is most beneficial to the Office. The Office will ordinarily prepare a solicitation requesting responses. In some cases, however, the process of issuing a solicitation and awaiting the submission of responses is not necessary or appropriate. For example, if the Office is purchasing off-the-shelf commercial products and its market research efforts indicate that a particular product is the “best buy,” the Contracting Officer can simply place an order for the product.

**3911.2** When the Office issues a solicitation, its length and contents will depend on factors such as the size of the procurement, the nature and complexity of the goods or services, the contracting procedure to be used, and the contract type. In general, however, a solicitation should clearly describe the Office’s needs (e.g., by providing a statement of work outlining the type of services required, or information specifying product characteristics or capabilities) and its evaluation criteria.

**3911.3** In preparing a solicitation, the Office should seek to enhance competition by carefully scrutinizing and eliminating, to the extent possible, any unnecessary requirements that may restrict the number of prospective sources or the range of goods or services they can offer. Such provisions may include, for example, technical specifications that limit the competitive field, unnecessarily aggressive delivery schedules, or burdensome terms and conditions that might deter smaller companies from competing.

**3911.4** The Office may issue solicitations in paper form or electronically. The Office may also use oral solicitations where efficient and practical (e.g., where the procurement does not involve extensive specifications, detailed evaluation criteria, or numerous line items). The Office may cancel a solicitation and reject all bids or proposals received at any time before contract award when cancellation is in the Office's best interests.

## **3912 PUBLICIZING PROCUREMENT OPPORTUNITIES**

**3912.1** The Office may use a variety of methods to publicize a procurement. The specific method or methods used should be tailored to the particular procurement, taking into account factors such as the size of the procurement, the type of goods or services sought, the urgency associated with the requirement, and the most efficient means of disseminating information in the relevant market. The methods available to publicize procurement opportunities offered by the Office include print advertising, internet notices, developing "source lists" of qualified firms known to supply particular categories of goods or services, soliciting specific sources through written notices or telephone contacts, and holding pre-bid or pre-proposal conferences.

**3912.2** The Office shall use its best efforts to provide (either electronically or in a paper format) a copy of solicitations to LSDBEs of which the Office is aware that may be capable of providing some or all of the services or goods required by a solicitation.

**3912.3** In addition to publication or other method of publicizing the procurement opportunity described in §503.1, unless otherwise specified herein, the Office shall also compile a list of at least three vendors that the Office reasonably believes are qualified to provide the services or goods specified in a solicitation and shall provide those vendors with a copy of such solicitation. In the event the Office is unable to locate at least three potential vendors, the Office shall provide the solicitation to as many vendors as it can reasonably identify.

## **3913 CONTRACT TYPES**

**3913.1** The type of contract awarded by the Office will generally depend on factors such as the particular goods or services to be acquired, whether the costs of the goods or services can be estimated in advance with reasonable accuracy, and the degree to which the precise nature and extent of the contract work is known at the time of award. A wide selection of contract types is available, which include:

- (a) fixed price contracts;
- (b) cost reimbursement contracts;
- (c) delivery order contracts; and
- (d) time-and-materials or labor hours contracts.

The sections below describe these contract types in greater detail. The Office may also award any alternative type of contract that will produce reasonable value in the context of

a particular procurement. However, the Office may not award “cost-plus-percentage-of-cost” contracts.

### **3914 FIXED-PRICE CONTRACTS**

**3914.1** “Fixed price” contracts include several variants:

- (a) firm, fixed price contracts;
- (b) fixed price contracts with economic price adjustment; and
- (c) fixed price incentive contracts.

Unlike cost reimbursement contracts, any type of fixed price contract obligates the contractor to complete the contractually-specified work for a fixed price.

**3914.2** A firm fixed price contract provides for a price that is not subject to adjustment, except in the event of a change to the contract work.

**3914.3** A fixed price contract with economic price adjustment provides for an upward or downward adjustment in the stated contract price based on changes in certain benchmarks specifically identified in the contract (e.g., catalog prices, or the producer price index for a particular commodity), subject to a ceiling on upward adjustments.

**3914.4** A fixed price incentive contract generally provides for establishing a final price by applying a formula based on the relationship between the total cost actually incurred by the contractor and a total “target” cost, thus resulting in the parties sharing in the cost savings or increases associated with differences between the actual and target cost. These contracts also can include incentive formulas based on the contractor’s schedule or technical performance.

### **3915 COST REIMBURSEMENT CONTRACTS**

**3915.1** Cost reimbursement contracts provide for the contractor to recover the reimbursable costs it incurs in contract performance, plus a fee (i.e., a profit). A “reimbursable” cost must be:

- (a) reasonable in nature and amount;
- (b) properly allocable to the contract;
- (c) determined in accordance with generally accepted accounting principles; and
- (d) not identified as nonreimbursable under the terms of the particular contract.

To ensure that the Office’s payment obligations are not open-ended, a cost reimbursement contract must specify an estimated total cost that the contractor cannot exceed (except at its own risk) without the Contracting Officer’s written approval. Because the contractor can cease performance once it reaches the estimated total cost (unless the Contracting Officer approves an increase), it is not obligated to complete the contract work unless it can do so within the not to exceed limit.

**3915.2** Cost reimbursement contracts can take three forms:

- (a) cost-plus-fixed-fee;
- (b) cost-plus-incentive-fee; and
- (c) cost-plus-award-fee.

The differences between these types of contracts relate to the manner in which the contractor's fee is determined.

**3915.3** A cost-plus-fixed-fee contract provides for a fee that is fixed at the contract's inception, and is not subject to adjustment unless the contract is modified to change the contract work.

**3915.4** A cost-plus-incentive-fee contract provides for a fee that generally is determined by applying a formula based on the relationship between the contractor's total reimbursable cost and a total target cost, subject to a specified minimum and maximum. These contracts also can include incentive formulas based on the contractor's schedule or technical performance.

**3915.5** A cost-plus-award-fee contract provides for:

- (a) a base fee fixed at the contract's inception; and
- (b) an "award" fee that the contractor may earn (in whole or in part) during performance, which is designed to motivate superior performance.

The award fee is determined unilaterally by the Office, based on its judgment and evaluation of how well the contractor has performed in relation to the award fee criteria identified in the contract.

**3915.6** In appropriate circumstances, the Office may include a guaranteed maximum price ("GMP") in a cost reimbursement type contract. A GMP differs from a not-to-exceed amount in that a contractor is required to complete performance of the base scope of work required under the contract for an amount that does not exceed the GMP. Under such an approach, if the total cost exceeds the GMP, the contractor shall be required to complete performance of the base scope of work at its own cost and expense.

## **3916 BASIC ORDERING AGREEMENTS**

**3916.1** Under a basic ordering agreement (also known as task order contracts or term contracts), the contractor's performance obligations are triggered when the Office subsequently issues task orders pursuant to the contract. Basic ordering agreements include:

- (a) requirements contracts; and
- (b) indefinite quantities contracts.

**3916.2** A requirement contract provides the mechanism for the Office to order from the contractor all of its requirements for designated supplies or services during a specified period (subject to any maximum ordering limitation in the contract). This type of contract should only be used when the Office determines that it will provide superior economic benefits to an indefinite quantity contract as it locks the Office into one source of supply for the goods or services required under the basic ordering agreement. A requirements contract must be approved by the CCO in addition to the contracting officer.

**3916.3** An indefinite quantity contract provides for an indefinite quantity, within specified limits, of supplies or services to be furnished during a fixed period. Such a contract:

- (a) requires the Office to order and the contractor to deliver at least the stated minimum quantity of supplies or services; and
- (b) requires the contractor to deliver any additional quantities the Office may order during the contract period (subject to any maximum quantity limitations in the contract).

The Office may award a single indefinite quantity contract for particular goods or services, or may award multiple contracts and choose between the selected contractors in awarding subsequent delivery orders.

**3916.4** If an indefinite delivery contract is used, at the time the basic ordering agreements are awarded, the Office shall establish a procedure by which work will be awarded under the basic ordering agreements. Traditionally, one of two methods is used:

- (a) work can be assigned on a rotation basis (i.e., the first task order is given to contractor 1, the second task order to contractor 2, etc.); or
- (b) the Office may request task order proposals from two or more contractors holding an indefinite delivery contract.

The second of these approaches is preferred. If the second approach is used, each task order request shall specify: (i) the specific goods or services required; (ii) a delivery date; and (iii) such other information as the Office may reasonably request.

## **3917 TIME AND MATERIALS CONTRACTS AND LABOR HOURS CONTRACTS**

**3917.1** Time-and-materials contracts provide for acquiring supplies or services on the basis of:

- (a) direct labor hours, charged at fixed hourly rates that include overhead and profit; and
- (b) materials (which may be charged either at their actual cost or at fixed unit prices).

A labor hours contract is a time-and-materials contract that does not involve materials. Both types of contracts should specify a ceiling price.



## **3918 CONTRACTING PROCEDURES**

### **3919 CONTRACTING PROCEDURES GENERALLY**

**3919.1** Every procurement by the Office shall be conducted in accordance with competitive contracting procedures, suitable to the specific procurement, that produce reasonable value and reasonable results. The contracting procedures the Office may use include, but are not limited to, the procedures described below.

**3919.2** The Contracting Officer may award contracts on a “sole-source” basis only when:

- (a) the goods or services sought by the Office are available from only one responsible source;
- (b) circumstances beyond the Office’s control require an immediate award; or
- (c) sole-sourcing is necessary to achieve the Office’s goals for contracting with LSDBEs.

Prior to entering into any such sole-source contract, the CCO shall first certify that the requirements of this section have been satisfied. In any other case, the Office shall adopt a competitive procurement strategy in which it evaluates bids or proposals from any source that wishes to compete, or from a reasonable number of qualified sources.

### **3920 SEALED BIDDING**

**3920.1** The solicitation used to initiate a procurement conducted by sealed bidding is known as an Invitation for Bids (“IFB”). The Office shall allow prospective bidders a reasonable time to prepare and submit bids.

**3920.2** The evaluation factors used in sealed bid procurements are limited to price and price-related factors (including price evaluation preferences for LSDBEs). The IFB shall specify:

- (a) any information necessary to explain how the Office will evaluate price (e.g., whether option prices will be evaluated);
- (b) any price-related factors that will be evaluated and their relative importance in the overall evaluation scheme;
- (c) a description of the goods or services sought (including quantity requirements);
- (d) the contract delivery schedule;
- (e) a description of any special qualification requirements the contractor must satisfy;
- (f) instructions for submitting bids (including the deadline for bid submission, the method(s) for submitting bids, any representations or certifications bidders must submit, and any requirements for the submission of items such as bid samples, subcontracting plans, or payment or performance bond);

- (g) the period during which bids must remain open for acceptance; and
- (h) the contract's terms and conditions.

**3920.3** Any changes in the information set forth in an IFB must be made by an amendment to the IFB.

**3920.4** Bids shall be submitted by a method specifically permitted by the IFB (e.g., hand delivery, mailing, electronic transmission, or fax). A bid may be withdrawn or modified at any time before bid opening, by any of the methods permitted for submitting bids. A late bid (or late modification or withdrawal) shall not be considered, except that the Office may accept a late modification to an otherwise successful bid that makes the bid more favorable to the Office. A late bid is any bid received after the bid date, unless such delay is caused by the Office. The Contracting Officer shall prepare an abstract listing the bid prices, which shall be maintained in the contract file.

**3920.5** The contract shall be awarded to the qualified bidder whose bid is responsive to the IFB and is most advantageous to the Office, considering only price and the price-related evaluation factors identified in the IFB. A "responsive" bid must comply in all material respects with the IFB. Responsiveness involves matters that relate to the bid itself, as opposed to the responsibility or other qualifications of the bidder. In determining whether a bid is responsive, the Contracting Officer has the discretion to waive or permit correction of minor informalities or irregularities.

## **3921 COMPETITIVE NEGOTIATION**

**3921.1** The solicitation used to initiate a procurement conducted by competitive negotiation is known as a Request for Proposals ("RFP"). The Office shall establish a reasonable deadline for offerors' submission of initial proposals.

**3921.2** The evaluation criteria used in procurements conducted by competitive negotiation include price or cost (including, but not limited to, hourly rates for services and fixed fees for cost reimbursement contracts), along with any other factors appropriate to the particular procurement (e.g., the offeror's technical approach, past performance, or its status as a LSDBE or plans for subcontracting with such enterprises). The RFP may, if the Office deems it advisable, contain either (i) an estimate that generally describes the price range contemplated by the Office; or (ii) a funding limitation for the procurement.

**3921.3** The RFP shall specify all evaluation factors and their relative importance. The RFP should also include:

- (a) a description of the goods or services sought (including quantity or estimated quantity);
- (b) the contract delivery schedule (including any permitted variations in the delivery schedule);
- (c) a description of any special qualification requirements the contractor must satisfy;

- (d) instructions for submitting proposals; including the deadline for proposal submission, the method(s) for submitting proposals, the information to be provided in the proposal (including any requirements for past performance information or for subcontracting plans), and any representations or certifications the offeror must submit;
- (e) the period during which proposals must remain open for acceptance; and
- (f) the anticipated contract terms and conditions, and the extent to which they are negotiable.

**3921.4** Any changes in the information set forth in an RFP must be made by an amendment to the RFP.

**3921.5** Proposals shall be submitted by a method specifically permitted by the RFP. The Office shall evaluate proposals based solely on the evaluation criteria specified in the RFP. Where past performance is an evaluation factor, the Office is not limited to considering only the information from references listed by the offeror.

**3921.6** After initial proposals have been evaluated, the Contracting Officer may:

- (a) make an award based on initial proposals; or
- (b) establish a “competitive range” consisting of those proposals that remain under consideration (or a single proposal that remains under consideration), and initiate discussions with competitive range offerors. A competitive range shall include all proposals that, in the Contracting Officer’s judgment (erring on the side of the offeror), could be awarded the procurement.

**3921.7** Discussions with offerors may be written (including electronic) or oral. The primary objective of discussions is to maximize the Office’s ability to obtain the best value, based on the evaluation factors set forth in the RFP. The scope and extent of discussions are a matter of Contracting Officer judgment. At the conclusion of discussions, the Contracting Officer shall request all offerors that still remain under consideration to submit best and final offers by a common cut-off date.

**3921.8** The contract shall be awarded to the qualified offeror whose offer is most advantageous to the Office under the RFP’s evaluation criteria. The Contracting Officer shall prepare documentation explaining the basis for the contract award decision, which shall be maintained in the contract file.

## **3922 SIMPLIFIED CONTRACTING PROCEDURES**

**3922.1** The basic purposes of simplified contracting procedures are to:

- (a) promote economy, efficiency, and innovation in contracting;
- (b) reduce administrative costs to the Office; and

- (c) avoid unnecessary burdens or complexities that could reduce competition, such as by deterring smaller contractors from participating in a procurement.

Simplified contracting procedures may be used only with contracts that have an estimated value equal to or less than \$100,000.

**3922.2** The Contracting Officer shall conduct simplified procurements in the manner that is most suitable, efficient, and economical based on the circumstances of each acquisition. As appropriate, the CCO may elect to use or adapt procedures that are part of the sealed bidding or competitive negotiation process. On any simplified procurement, the Contracting Officer shall:

- (a) promote competition to the extent practicable and efficient;
- (b) establish reasonable deadlines for the submission of responses to solicitations; and
- (c) evaluate quotations or offers in an impartial manner on the basis established in the solicitation.

However, with regard to any contract that has an estimated value of more the \$25,000 but which is procured through the simplified contracting procedures, the Office shall obtain written quotes from at least two (2) potential suppliers.

**3922.3** The Contracting Officer may solicit quotations orally in appropriate cases when doing so is practical and economical. When soliciting orally, the Contracting Officer may accept oral quotations or may instruct suppliers to respond in writing. When oral quotations are accepted, the Contracting Officer shall document such quotations in writing and include the documentation in the contract file.

**3922.4** Any oral solicitation shall provide a clear description of the Office's requirements (including the type of goods or services sought, quantities, and schedule) and the basis on which award will be made. The basis for award may be price or cost alone, or price/cost and other factors. Solicitations are not required to state the relative importance assigned to each evaluation factor. Written solicitations shall provide a complete statement of relevant information without being unnecessarily lengthy. A written solicitation should include the same information required in an oral solicitation, plus the following:

- (a) anticipated contract terms and conditions (and the extent to which they are negotiable);
- (b) applicable certifications or representations; and
- (c) instructions for submitting responses.

**3922.5** The price/cost and other terms of the award shall be set forth in a written contract or purchase order. The Contracting Officer shall include a statement in the contract file briefly explaining the basis for the award decision.

### **3923 DC SUPPLY SCHEDULE; GSA SCHEDULES**

**3923.1** The Office may purchase goods and services (but not construction or any other type of contract awarded on a cost reimbursement basis) from the DC Supply Schedules or the GSA Schedule.

### **3924 SOLE-SOURCE CONTRACTING PROCEDURES**

**3924.1** Sole-source contracting procedures may be used only in situations referred to in section 701.2. The justification for using sole-source procedures shall be documented in the contract file. The solicitation and evaluation procedures used on a sole-source procurement shall be tailored to the specific acquisition, taking into account the justification for sole-sourcing.

**3924.2** The Office may use oral solicitations on sole-source procurements in appropriate cases when doing so is practical and economical. The price/cost and other terms of the award shall be set forth in a written contract or purchase order.

### **3925 CONTRACT ADMINISTRATION**

#### **3926 THE CONTRACTING OFFICER'S RESPONSIBILITY FOR CONTRACT ADMINISTRATION**

**3926.1** The Contracting Officer for a particular contract has overall responsibility for the contract's administration. Among other things, this requires the Contracting Officer:

- (a) to monitor whether goods or services are delivered or completed on schedule, and conform to contract requirements;
- (b) to ensure that any contractually required inspection or acceptance procedures are followed;
- (c) to monitor the contractor's compliance with any subcontracting requirements contained in the contract; and
- (d) to identify and attempt to resolve issues or problems that arise during contract performance.

**3926.2** The Contracting Officer is the only representative of the Office with the authority to take the following actions:

- (a) authorize contract payments;
- (b) exercise contract options;
- (c) terminate the contract; and
- (d) modify the contract.

Provided, however, that prior to terminating any such contract, the Contracting Officer shall first obtain the approval of the CCO.

**3926.3** No representative of the Office, including a Contracting Officer shall:

- (a) act in a manner that misleads a contractor regarding the limits of his or her authority; or
- (b) direct or encourage a contractor to perform work that has not been properly authorized.

## **3927 PAYMENT REQUESTS**

**3927.1** Requests for payment must be submitted in writing by the contractor. Contractor payment requests shall:

- (a) certify that the contractor is entitled to payment in the requested amount; and
- (b) include or attach any information necessary to demonstrate entitlement to the requested payment under the contract's terms.

Depending on the contract's payment provisions, this may involve, for example, a statement that specified work has been completed in a satisfactory manner, documentation showing that contract deliverables have been accepted by the Office, or information detailing the reimbursable costs incurred by the contractor. Payment shall not be made unless authorized by the Contracting Officer. A Contracting Officer's payment authorization shall not preclude the Office from seeking repayment (or pursuing other remedies) if it subsequently concludes that the contractor was overpaid.

**3927.2** In addition to the Contracting Officer's payment authorization, all payment requests must be certified and approved by the Office's Chief Financial Officer (or his or her designee) prior to making any payment.

## **3928 EXERCISING THE CONTRACT OPTIONS**

**3928.1** The Contracting Officer may exercise a contract option upon determining that:

- (a) funds are available;
- (b) the goods or services covered by the option fulfill an existing need; and
- (c) exercising the option is the most advantageous method of fulfilling the Office's need.

The determination shall be in writing and shall be included in the contract file. To exercise an option over \$100,000 the Contracting Officer must also obtain the approval of the CCO.

**3928.2** In addition to the approval of the CCO (if applicable), prior to exercising any option, the approval of the Office's Chief Financial Officer shall be obtained as to whether funds are available for the exercise of such option.

### **3929 CONTRACT MODIFICATIONS**

**3929.1** The Contracting Officer may modify a contract subject to these provisions; provided, however, that any modification in excess of \$100,000 shall require the approval of the CCO. Any such modification must be within the general scope of the original contract. Any requirement for extra work that goes beyond the contract's general scope shall be the subject of a new procurement.

**3929.2** A contract modification may be effected:

- (a) by a bilateral agreement executed by the Contracting Officer and an authorized representative of the contractor; or
- (b) by the Contracting Officer's issuance of a written change order, when the contract includes a "Changes" clause permitting the Office to make unilateral changes in the contract work. Under such a clause, the contractor is obligated to perform in accordance with a change order issued by the Contracting Officer, and the contract price is adjusted to reflect the increase or decrease in costs caused by the change.

### **3930 CONTRACT TERMINATION**

**3930.1** All contracts awarded by the Office shall include "Termination for Default" and "Termination for Convenience" clauses specifically defining the Office's termination rights.

**3930.2** When exercising the Office's rights under a termination clause in the contract, the Contracting Officer shall provide the contractor with a written notice specifying:

- (a) whether the termination is for default or for convenience;
- (b) the effective date of the termination;
- (c) the extent of the termination, if the termination is partial; and
- (d) any special instructions that apply to the termination (e.g., instructions concerning the disposition of contract inventory).

After terminating a contract for convenience, the Contracting Officer shall request a settlement proposal from the contractor, and shall attempt to negotiate a settlement that resolves all of the parties' rights and liabilities (except those arising from any portion of the contract still in effect). If the parties negotiate a settlement, the Contracting Officer shall prepare a memorandum describing the principal elements of the settlement for inclusion in the contract file.

### **3931 CONTRACT DOCUMENTATION**

**3931.1** The Contracting Officer is responsible for maintaining documentation regarding the contract and the procurement in the contract file. The contract file shall include:

- (a) the solicitation and any amendments;
- (b) the contract and any modifications;
- (c) any type of documentation that is specifically required to be maintained in the contract file by other sections of these rules; and
- (d) any other documentation that may be necessary to memorialize important decisions or events relating to the procurement or the contract.

**3931.2** The Contracting Officer shall endeavor to include with every solicitation the form of the contract that the contractor will be required to enter into. To the greatest extent possible, the Office should endeavor to provide clear, concise contract documents. Contracts which consist of the solicitation, the proposal and other documents attached together, but not integrated into a single contract document are discouraged.

### **3932 TRANSFER OF CONTRACTS**

**3932.1** Contracts or pending procurements held by the District of Columbia Public Schools may be assigned to the Office in accordance with the following provisions.

**3932.2** The CCO shall review any such proposed procurement or contract and determine whether it is in the best interest of the Office to accept the assignment of such procurement or contract or to terminate the procurement or contract.

**3932.3** In the event the Office determines it is in its best interest to accept the assignment of a contract or procurement, the Office shall have the authority to modify the contract or procurement so as to conform with best practices and the procedures employed by the Office on its own procurements.

### **3933 DISPUTES**

**3933.1** Each contract entered into by the Office shall include a disputes clause which sets forth the procedures by which disputes shall be resolved.

**3933.2** The disputes clause may, if the Contracting Officer determines it to be in the best interest of the Office, provide for the resolution of disputes through binding arbitration within or without the District of Columbia.

### **3934 PROTESTS**



**3934.1** All protests to the award of a contract by the Office shall be resolved in accordance with this section. Any such protest shall be first made to the Contracting Officer in writing. Any such protest shall include:

- (a) the name of the protestor;
- (b) the protestor's counsel or other representative;
- (c) a detailed description of the basis for the protest; and
- (d) the relief requested.

The Contracting Officer shall promptly issue a decision with regard to any such protest. If the Contracting Officer is other than the Director, the protestor may appeal the Contracting Officer's decision to the Director. Any such appeal shall be submitted to the Director within three (3) business day after the protestor receives the Contracting Officer's decision. The decision of the Director shall be the Office's final decision with regard to the protest.

**3934.2** Protests must be filed within the timeframes established hereby to be considered by the Office. Any protest that is not filed within such timelines will not be considered by the Office and the protestor shall be deemed to have waived the right to protest. Any protest which is based on the language or requirements of a solicitation or is otherwise based on facts which are apparent on the face of the solicitation shall be filed at least five (5) business days prior to the date proposals are due. Any protest that is not based on the language or requirements of a solicitation or otherwise based on facts which are apparent on the face of a solicitation must be submitted within five (5) business days of when the protestor know or should have known of the facts that serve the basis for the protest.

### **3935 APPLICABLE LAWS**

**3935.1** The Office shall comply with the requirements of the First Source Employment Agreement of 1984, effective 29, 1984 (D.C. Law 5-93; D.C. Official Code § 2-219.01 *et seq.*), and the Small, Local, and Disadvantaged Business Enterprise Development and Assistance Act of 2005, effective October 20, 2005 (D.C. Law 16-33; D.C. Official Code § 2-218.01 *et seq.*)

Persons desiring to comment on these proposed rules should submit comments in writing to Allen Y. Lew, Director, Office of Public Education Facilities Modernization, 2400 East Capitol Street, SE, Washington, D.C. 20003 no later than thirty (30) days after the date of publication of this notice in the D.C. Register. Copies of these proposed rules may be obtained between 8:30 a.m. and 5:00 p.m. at the address stated above.



*Government of the District of Columbia*  
**Office of Public Education Facilities Modernization**

## **FY 2008 WORK PLAN**

### *Office of Public Education Facilities Modernization*

*December 3, 2007*

*Allen Y. Lew*  
*Executive Director*

## VI. Fiscal Year 2008 OPEFM WORK PLAN

The Work Plan for School Modernization in Fiscal Year 2008 includes three (3) major components:

1. **Stabilization:** The effort to ensure safe and healthy learning and working environments in all schools as they await Modernization;
2. **Modernization:** The school-by-school major rehabilitation projects conceptually defined in the Master Facilities Plan; and
3. **Master Facilities Plan:** The review, refinement, and vetting of the guiding document for the implementation of the Modernization program.

### A) *Stabilization*

The goal of the stabilization project is to correct existing deficient facility conditions in the scoped inventory of DC Public Schools, which violate codes, or jeopardize the health or safety of the students and staff. In addition, it will correct facility deficiencies, which negatively impact the learning environment of the DCPS students and staff and require correction prior to currently planned modernization. The Scope of the project includes all active schools not included in the DCPS Summer Blitz or Targeted Maintenance Programs and which are not currently undergoing modernization.

#### **Prioritization of Work:**

Work is to be completed in phases, with the following priorities:

1. Security Enhancements Currently Underway at 8 (eight) High Risk High Schools in the District.
  - Door and Door Hardware Improvements
  - CCTV (Closed Circuit Television) at Egresses
2. Air Conditioning / Electrical Enhancements
  - In order to achieve the goals of ensuring that all classrooms have air conditioning for the next cooling period, assessments are being finalized to identify which schools require additional cooling in addition to electrical upgrades to meet the current and future load demands of not only the air conditioning units, but also computers, and various other equipment increasing the load demands.

– Activities This Month:

- i. Based upon data collected schools have been allocated into two groups based upon the level of work needed for each:
  - Group No. 1 – Schools that require only running new circuits to existing panels and AC equipment installation (~70 schools) or those requiring the construction of new risers , new panel installation and AC installation .
  - Group No. 2 - Those requiring the upgrade of the PEPCO service to the school, and construction of new switchgear, risers, panels and branch circuits (~35 schools).
- ii. The procurement strategy has been developed.
- iii. Schedule Status: Tentative project schedules have been developed for each of the above with alternatives for a normal bid and award process and a sole source contract award. Currently the project schedule goal appears to be achievable for schools in group #1 only.
- iv. Cost: A preliminary budget of \$33 million has been established.
- v. Challenges: Implementation of work associated with those schools classified as Group No. 2 requires much coordination and cooperation on behalf of PEPCO to design and construct upgraded electrical services to each school.

**Overall Stabilization Program Work Plan – Balance of Stabilization Work**

– ***Program Work Plan***

*Pre-Program Phase*

Objective– Develop preliminary work scopes as a basis for further evaluation and design, and to develop/verify overall program budget cost.

Tasks

- Identify open DCPS work orders requiring correction,;
- Identify other deficient conditions requiring correction;
- Establish preliminary scope of work for each deficient condition;
- Develop cost estimates for the scope of work for each deficiency.
- Prepare aggregate cost estimates for use in presenting requests for funding and to serve as a basis for budgeting.

### Process

- Conduct a review of existing deficiencies using all available sources of information
- Develop database suitable for macro cost development and organizing the detailed surveys by the several design disciplines
- Reviews identified deficiencies for each school and determine if the deficiencies should be corrected prior to plan school modernization.

### Resource Requirements

- Architects, engineers, and technicians to survey schools.
- M&M/B&D Program Manager

## **Phase I. - Program Development**

Objective – Design, package, and prepare detailed scopes of work, cost estimates, and drawings as required for contracting stabilization construction work.

### Tasks

- Organize the deficiencies into “market-efficient “packages for contracting ,
- Investigate the packaged deficiencies in detail and perform additional evaluation, design, and cost estimating as required.
- Prepare contract documents for the preparation of stabilization construction contracts.
- Identify asbestos and lead abatement requirements preliminary to beginning construction activities. Develop a process acceptable to DCPS Office of Modernization for removal, testing and documenting abatement.

### Process

- Procure the services of design professionals with specific applicable expertise to prepare contract documents for the various construction packages .The firms will be responsible to review and evaluate scoped deficiencies, and perform design and building code review. They will prepare contract scopes , and design drawings and specifications where needed for permitting and to assure that repairs are performed in accordance with existing codes.
- This will require visits to the schools to gather more detailed information on the identified deficiencies.
- Contract development consultants will be overseen by project managers from M&M/B&D
- Develop cost estimates for construction packages.
- Test building materials for the presence of lead and/or asbestos in areas within the scope of the construction work.

### Resource Requirements

- M&M/B&D Program Manager and administrative assistant.
- Two –three M&M/B&D project managers to oversee stabilization contract development
- Architectural firms will be required to address ADA Compliance, Building Code, and exterior and interior finish work will be headed by an Architect.
- Mechanical Engineering firms will be required to address MEP and Fire and Safety work.
- Electrical Engineering firms will be required to address electrical and technology deficiencies and to perform load studies on all schools with increased AC capacity
- A roofing expert will be required to evaluate and recommend corrections for roofing and roof drainage deficiencies
- A hazardous materials abatement consultant will be required to perform abatement testing
- A hazardous materials abatement contractor will be required to perform abatement work
- A civil/structural engineer will be required to address structural and site work deficiencies
- Administrative Assistant to coordinate school access, maintain documentation

### **Phase II. Procurement**

Objective – Fund, obtain approval and advertise for bid the various packaged stabilization construction projects.

#### Tasks

- Contract for and perform hazardous materials abatement work.
- Issue bidding documents, take bids and award contracts for performing stabilization construction
- Meet requirements for LDBES participation.
- Establish list of pre-qualified contractors for specific areas of construction work.
- Obtain permits for performing construction work.
- Track overall program cost and schedule performance.

### Process

- Prepare contracts consistent with the OPEFM procurement rules. Develop standard set of contract special conditions which meet the needs and requirements of the DCPS Office of Modernization.
- Procure the services of abatement contractors to remove or encapsulate any hazardous materials prior to start of construction. Certify and document abatement in accordance with DCPS and legal requirements prior to beginning construction.
- Establish bid evaluation criteria.
- Receive, evaluate bids and award contracts to contractors selected to perform stabilization work.
- Expedite project schedules by submitting modification designs for approval when designs are complete. Investigate the permitting process and typical turn-around durations. Coordinate with DCRA by providing a “look-ahead schedule” of permits to be applied for as part of the Stabilization Program. Secure third party review assistance for peak load conditions which exceed the capacity of DCRA to process in a timely manner.

### Resource Requirements –

- M&M/B&D Project Manager and administrative assistant
- Asbestos/lead abatement contractor.
- Three Mechanical /Fire and Safety contractor(s)
- Three General / Architectural Contractors
- Three Electrical contractors
- One site work contractor
- One structural contractor.

### **Phase III- Construction**

Objective – Assure the construction work is performed in accordance with the stabilization contract documents.

### Tasks

- Monitor Construction Progress
- Approve Applications for Payments
- Manage the Contract Change Process
- Track overall program costs and schedule performance

#### Process

- Assign a construction manager from Contract development consultants will be overseen by project managers from M&M/B&D to each stabilization contract who will be responsible for ;
  - Holding regular weekly progress meetings with the contractors to monitor construction progress and address problems as they arise;
  - Surveying construction progress on an ongoing basis in the field;
  - Coordinating construction activities with DCPS school principals and staff;
  - Tracking and expediting requests for information from the contractors;
  - Monitoring construction progress and recommending approval of payment requests for work completed in accordance with the contract documents;
  - Tracking, reviewing, and recommending acceptance or rejection of Contract Changes;
  - Construction Quality Control and job site safety.

#### Resource Requirements

- M&M/B&D Project Manager and Administrative Assistant;
- M&M/B&D Construction Project Managers ( 3);
- Stabilization construction contractors;
- Specialty testing consultants as required.

### **Phase IV- Project Commissioning and Close-Outs**

#### Tasks

- Document modifications and repairs for use in maintaining and modifying the schools in the future
- Secure warranties for all equipment and construction
- Perform commissioning of AC equipment
- Develop and monitor completion of punch lists
- Recommend approval or disapproval of final payment.

#### Process

- Contractor will be required to mark up any design drawings that are issued as part of their respective contracts.
- Assure receipt of release of liens from contractors



### Resource Requirements

- M&M/B&D Project Manager and Administrative Assistant ;
- M&M/B&D Construction Project Managers ( 3);
- Stabilization construction contractors;

## **Preliminary Scope of Work**

### **Boilers Readiness**

---

A Heating Blitz program was completed to ensure each school will have heat at the beginning of the heating season (October 15). A number of the contractors engaged in the Summer Blitz and Targeted Repair programs were retained to follow-on with the Heating Blitz program. Each boiler was inspected and certified by DCRA Office of Inspections. Any deficiencies were corrected by the respective contractor and the boiler re-inspected and certified. In addition to the boilers, work now continues on all related ancillary mechanical equipment and distribution systems to determine improvements necessary to provide a regulated, comfortable environment throughout the winter months.

### **A/C Blitz**

---

Similar to the Heating Blitz, an Air Conditioning Blitz will begin shortly to address deficiencies in existing air conditioning equipment and distribution systems, upgrade classrooms that are not currently conditioned spaces, and ensure all classrooms will be comfortable during the warmer months. The contractors engaged in the Heating Blitz will take on the additional scope of the Air Conditioning Blitz and will work concurrently to complete the Blitz by March 2008. The first phase will include assessing the deficiencies and assembling a budget and schedule. In the second phase, the contractors will perform the scope as authorized by OFM.

### **Electrical Upgrades**

---

This scope item includes electrical repairs and modifications necessary to meet electrical code requirements, support ongoing educational needs, and to support the addition of interim window AC units until modernization. Typical modifications include replacement of distribution panels and wiring, replacement of existing inadequate lighting fixtures. A number of schools will require the performance of a load analysis to properly size the building service and any distribution system modifications.

## **Roof Leak Repairs**

---

The average age of a school building in the District is 63 years. Most of their roofs need repairs, while some need complete replacement. At present, the schools assessment team is looking at all damages due to roof leaks in the class rooms as well as offices and supporting spaces, to identify with a strategy that would distinguish those that can be repaired from the ones that need to be replaced. Essential to this process is the prioritization of repairs to identify those which can wait to be included in the long-term modernization efforts without impeding the school's day to day operations. If it is determined that a school needs a roof replacement, then the modernization list is referenced to see if the current work can wait to be included in that list or the replacement is urgent enough to warrant a change in strategy and replace the roof as soon as it is possible to avoid more costly repair work.

## **Fire and Life/Safety**

---

Active fire protection systems (including alarms and fire suppression systems) are inspected regularly to make sure that schools provide a safe learning environment for both students and staff. The schools system is regularly inspected by the DC Fire Marshall and records of compliance and or deficiencies are kept in a "running" log. In an effort to eradicate all deficiencies, the work log is regularly checked and work orders are issued to satisfy the requirements and comply with all Fire and Life/Safety violations. Health issues are prioritized based on the level of urgency and danger they pose to students and staff. Currently there are about xxxx open work orders related to Fire and Life/Safety violations, and this number will be reduced by 75% before the end of the year. The goal is to have an on-going program throughout the year while eliminating health and life threatening situations within the school system.

## **ADA Compliance**

---

In an effort to make all schools ADA Compliant, a survey was performed by EarthTech, a consultant hired by DCPS. The survey indicates that most of the schools need some form of additional work to comply with ADA Requirements.

- ***Progress to Date***

- Completed Activities**

- School deficiency surveys have been completed for the 73 scoped school buildings which, in addition to the 74 Summer Blitz and Targeted Repair schools, will be addressed by the Stabilization program. Sample reports have been developed showing several options for data presentation. The basis of the deficiency surveys has been the backlog of incomplete DCPS maintenance work orders. Deficiencies have been added for observed conditions, which meet the project criteria. Special deficiency cost items have been added to provide air conditioning to all offices and classrooms, bringing the schools into compliance with ADA requirements, and upgrading the electrical systems to support the added air conditioning.

- B) Modernization**

- OPEFM is providing management of the Modernization projects either already underway or previously scheduled as FY 2007 or FY 2008 projects by DCPS OFM. These include about 20 projects under construction, or in various stages of planning or design. While some of these projects are severely troubled (such as the Hardy Middle School / Fillmore Arts Academy), others have been delayed for years and require focused attention of OPEFM to move forward. In addition, OPEFM has undertaken management of projects on behalf of other agencies, such as the Department of Parks & Recreation in the case of the Wilson Pool. Detailed reports on each of these projects are included below.

- ***Ongoing Modernization Construction Projects***

- Brightwood ES
    - Rose Hardy MS/ Fillmore Arts Center
    - Sousa MS

- ***FY 2007 Modernization Construction Projects***

- H.D. Cooke ES
    - Alice Deal JHS
    - MacFarland JHS
    - Phelps Senior SHS
    - Randle Highlands ES
    - Samuel Wheatley ES
    - H.D. Woodson SHS

- ***FY 2008 Modernization Construction Projects***

- Cardozo SHS
    - Savoy ES
    - School Without Walls SHS

- ***Other Projects Underway***

- Wilson Pool (Ward 3 Aquatic Center)
    - Roosevelt HS Hospitality Program

## **Background**

Originally, the United States Army Corps of Engineers (USACE) was scheduled to implement all of the DCPS modernizations (Tier 0 thru Tier 4 – 52 schools). In 2001, The Transition Plan (transitioning the capital program from the USACE to DCPS) modified the USACE's Support Agreement, accelerating The Transition Plan and giving the USACE 22 schools and DCPS 30 schools for modernizations. The Board of Education and City Council requested a more aggressive acceleration. A Revised Transition Plan was developed, reducing the USACE's management of the modernization program to 12 schools and DCPS to 40 schools. However, DCPS did not have the internal capacity to manage the capital program. In 2001, through a competitive bidding process, DMJM was awarded a multi-year Staff Augmentation contract to assist DCPS in managing the capital improvement program. The DMJM contract did not reach full capacity until 2003 and was concluded in 2005. Some of the earliest projects now being implemented as modernizations were initiated under DMJM. Subsequently, a number of such projects were delayed due to a change of funding policy by the Board of Education, as it was determined that the overall capital needs being quantified for the projects exceeded the funding capacity, and many such projects were postponed or scaled back as part of the Transitional Capital Improvement Plan. Many of these were restored following the passage of the School Modernization Act of 2006 and the approval by the Board of Education of the 2006 Master Facilities Plan.

### **I. Projects Under Construction**

#### ***A. Hardy Middle School / Fillmore Arts Academy***

**Current Budget Authority:** \$33,081,052 (increased from \$31 m)  
(Original 2002 budget): \$20,586,000

**Scheduled Completion Date:** August, 2008 (planning documents anticipated August 2007)

**Project Team:** Architect: Einhorn, Yaffee, Prescott ("EYP")  
Contractor: Sigal Construction

**District Ward:** 2

**Budget Status:** OPEFM estimates the project is approximately \$12 million over the 2005 budget. Original construction cost of \$25 million had already been exceeded by at least \$5 million in scope change orders and delay claims, prior to the formation of OPEFM with additional exposures possible. Estimate by OPEFM Program Management is that the total 2005 budget of \$31 million may

require as much as \$12 million in additional funding (totaling \$43 million) to complete.

**Schedule Status:** OPEFM has replaced the previous contractor with Sigal Construction as a new CM. Sigal has mobilized on site and is anticipating project completion in August of 2008.

**Project History:** Hardy / Filmore was one of the first modernization projects initiated under DMJM / DCPS but was delayed, first by the funding policy change by the Board of Education and then, later, as initial bids exceeded budget, and the project was re-scoped with alternates identified to reduce cost. The contract was awarded in November 2005 as lump sum low bid, and the documents appear to have contained numerous errors and omissions. A large volume of RFI's were submitted by the JV immediately after contract award, and slow responses by EYP created a large backlog and project delays. The backlog has since been reduced but RFI's and change orders continue to be generated based on the JV's position that drawings are incomplete and inaccurate. The JV has also submitted a large number of delay claims, pointing mostly to slow decision-making by DCPS or other external issues, such as the delivery of permanent power by PEPCO.

**B. *Brightwood Elementary School***

**Current Budget Authority:** \$21,511,300

**Scheduled Completion Date:** December, 2007 (per construction contract - planning documents anticipated August 2007)

**Project Team:** Project Manager: Delon Hampton  
Architect: Ehrenkrantz, Eckstut & Kuhn (“EEK”)  
Contractor: Grunley/Guell

**District Ward:** 4

**Budget Status:** OPEFM estimates the project will finish approximately \$2.5 million over budget. Project is nearing completion on existing budget, but approximately \$2 million in various change orders are outstanding which will increase the final budget. In addition, restoration of the cupola, previously omitted from the scope, is currently estimated at \$250,000, and final cost may well exceed that figure.

**Schedule Status:** Project will finish 4 months behind schedule, in December 2007 rather than originally anticipated August 2007, mostly as a result of a demobilization by the contractor in reaction to slow payment.

**Project History:** Brightwood was also one of the first DMJM / DCPS managed modernization projects and was also delayed by the change in funding policy by the Board of Education, due to budget constraints. Project has not experienced same level of problems as Hardy, but slow approval of change orders and untimely payments by DCPS resulted in a number of projects for the contractor, including severely impacting the LSDBE work force participation and project critical path items (equipment orders, etc).

**C. *Sousa Middle School***

**Current Budget Authority:** \$30,900,405

**Scheduled Completion Date:** December, 2007 (originally August 2007)

**Project Team:** Project Manager: Delon Hampton  
Architect: Grimm & Parker  
Contractor: WSC / Thompkins

**District Ward:** 7

**Budget Status:** Project is expected to finish on budget, although this was adjusted upward at time of contract award as a result of bids exceeding budget.

**Schedule Status:** Project will finish in December, 2007, 4 months behind originally anticipated resulting primarily from issues at beginning of project.

**Project History:** The project had a slow start resulting from changes in decisions about use of swing-space vs. keeping students in the school. In addition, bids were received but not awarded for 18 months as they came in over budget and additional funding needed to be secured.

## **II. FY 2007 Construction Projects:**

### **A. *Addison Elementary School (Hyde Annex)***

**Current Budget Authority:** \$7,791,880

**Scheduled Completion Date:** August, 2008

**Project Team:** Architect: Lance Bailey  
Contractor: TBD

**District Ward:** 2

**Budget Status:** Project is currently expected to finish on budget.

**Schedule Status:** Project is currently expected to finish on schedule.

**Project History:** This project is an annex to Hyde Elementary programmed for gifted and talented students. It was approved in the 2006 Master Facilities Plan. However, funds were not identified until the Budget Support Act of 2005 (Cropp Funds) was approved in April 2006 and funds will not become available until October 1, 2007 (FY 08). Project is currently being re-bid, as initial bids received in August 2007 were determined to be non-responsive.



**B. *Alice Deal Middle School***

<b>Current Budget Authority:</b>	\$58,591,440
(Original 2002 budget):	\$30,360,000
(Reduced 2006 budget):	\$24,010,000

**Scheduled Completion Date:** Originally 2006, revised to August, 2009

**Project Team:** Architect: Quinn Evans  
Contractor: Heery

**District Ward:** 3

**Budget Status:** Project is expected to finish on budget, although this was adjusted upward at time of contract award and after value engineering, as a result of bids exceeding budget.

**Schedule Status:** Project experienced extensive early delays as part of DMJM generation of modernizations subjected to change in Board of Education funding policy, due to funding constraints, but has been proceeding on schedule since being re-initiated in 2007.

**Project History:** Alice Deal was another of the first DMJM / DCPS – managed modernization projects. The project was delayed due to changes in the Board of Education’s policy in funding modernizations, due to budget constraints. In the Transitional Capital Improvement Plan (FY 2006) the project was scaled back to a Systemic Rehabilitation Project. Under the revised 2006 Master Facilities Plan and the School Modernization Act of 2006, the full modernization was restored, and the Architect was directed to complete the design for a full modernization. Now that the project is funded at the correct value and is being implemented by a strong team, the only major concern of note is a land use dispute with the National Park Service. In 2003, DCPS and NPS held discussions in reference to a land swap. The land swap was driven by the need for sewer upgrades necessitated by the impending renovation to Deal. The existing sewer line cut from school property through NPS property. The parties agreed that DCPS would relocate a portion of the sewer during the upgrade. NPS did not want any responsibility for maintenance so the land swap was discussed with DCPS providing some additional land areas. However, the agreement was never finalized and the result is in some limbo. The parties agree there have been discussions but finalizing the deal is a legal issue and could take time. In the meantime, DCPS has designed and now begun construction on the NPS property.

**C) *H.D. Cooke Elementary School***

**Current Budget Authority:** \$32,241,700  
(Original 2002 budget): \$14,030,000

**Scheduled Completion Date:** Originally 2004, revised to August 2009

**Project Team:** Architect: Quinn Evans  
Contractor: Gilbane

**District Ward:** 1

**Budget Status:** Project is expected to finish on budget, although this was adjusted upward at time of contract award and after value engineering, as a result of bids exceeding budget.

**Schedule Status:** Project experienced extensive early delays as part of DMJM generation of modernizations subjected to change in Board of Education funding policy, due to funding constraints. Project was re-initiated in 2007 and is proceeding on schedule.

**Project History:** HD Cooke was another of the first projects initiated under DMJM / DCPS management and was therefore delayed by the Board of Education change in funding policy, due to budget constraints. Students were relocated out of the school and bussed across town to swing space in 2002, as a design was complete and believed ready to implement at time; however, numerous problems with implementation of that design (including need for easements with adjacent property owners), and changes to the Master Education Plan necessitated a design revision when the project was delayed for funding. Project was re-bid as design-build to Gilbane with Quin Evans and is now proceeding into construction.

#### D. *HD Woodson Senior High School*

<b>Current Budget Authority:</b>	\$77,810,000
(Original 2002 budget):	\$34,131,000

**Scheduled Completion Date:** Originally 2005, revised to August 2010

**Project Team:** Architect: SHW/KCI  
Contractor: Hess

**District Ward:** 7

**Budget Status:** Project is to be re-designed and estimated.

**Schedule Status:** Project experienced extensive early delays as part of DMJM generation of modernizations subjected to change in Board of Education funding policy, due to funding constraints.

**Project History:** H.D. Woodson SHS design phase was managed by the U.S. Army Corps of Engineers. The construction documents were reviewed by DCPS/DMJM staff and deemed as “Not Constructible.” DCPS transferred the project from the USACE, for some re-designing, and for DCPS project implementation. After initial design in 2003 was determined to be over budget, project was shelved. Project was re-initiated in 2007 but previous design team, a joint venture between SHW and KCI, no longer exists. A proposal to revise design by SHW is to be submitted to Council for approval.

**E.     *Phelps Senior High School***

**Current Budget Authority:**     \$56,120,000

**Scheduled Completion Date:**   August 2008

**Project Team:**           Architect: Fanning Howey  
                                  Contractor: Turner

**District Ward:**           5

**Budget Status:** Project is currently on budget.

**Schedule Status:** Project is currently on schedule.

**Project History:** No major complications of note.

**F. *Randle Highland Elementary School (Final Phase)***

**Current Budget Authority:** \$6,110,051 (final phase)

**Scheduled Completion Date:** August, 2008 (final phase, originally scheduled for completion in 2003)

**Project Team:** Architect: JFI  
Contractor: Manhattan-Forney

**District Ward:** 7

**Budget Status:** Project is still in design and awaiting GMP proposal.

**Schedule Status:** This final phase is proceeding on its current schedule although this is greatly revised from original completion of 2003. The project was broken into phases for insufficient funding.

**Project History:** The demolition of the 1961 building, Phase 1 (The new building), Phase 2 (The gymnasium/auditorium) at Randle Highland ES were designed and constructed under the management of the U.S. Army Corps of Engineers, due to budget constraints. The project was over budget, and DCPS reduced the USACE's scope of work by returning the project's final phase (the 1911 Administration Building) under DCPS management for completion of the project. Some minor re-designing is required. The current scope of this project is the remaining work from the original modernization project that began in 2000 and was originally scheduled to be completed by the end of 2003. The current scope of work involves the modernization of the 1911 Randle Highlands school building which will house the administrative and media areas from the school. This phase was put on hold due to lack of funds.

**G.     *Wheatley Elementary School***

**Current Budget Authority:**     \$23,617,000

**Scheduled Completion Date:**   Originally 2006, revised to August, 2009

**Project Team:**           Architect: Lance Bailey  
                                  Contractor: Hess

**District Ward:**           5

**Budget Status:** Project is currently on budget, based on GMP with anticipated VE targets.

**Schedule Status:** Project experienced extensive early delays as part of DMJM generation of modernizations subjected to change in Board of Education funding policy, due to funding constraints.

**Project History:** Wheatley ES design phase was managed by the U.S. Army Corps of Engineers. The project was advertised for bids. The lowest responsible bidder came in 20% over the Independent Government Estimate. DCPS transferred the project from the USACE, for some re-designing, and for DCPS project implementation. The project was shelved until additional funding could be obtained. Value engineering was performed with selected contractor prior to award in September 2007. The project is currently ready to proceed into construction, pending receipt of building permit.

### **III. FY 2008 Construction Projects:**

#### **A. *Walker Jones***

**Current Budget Authority:** \$36,570,000

**Scheduled Completion Date:** August, 2011

**Project Team:** Project Manager: DMPED  
Architect: HSMM  
Contractor: TBD

**District Ward:** 6

**Budget Status:** Project is still in design and requires estimating.

**Schedule Status:** Project is currently on schedule.

**Project History:** Initially, the design phase of Walker-Jones ES was managed by the U.S. Army Corps of Engineers, up to construction documents. In 2006, when the Mater Facilities Plan converted Walker-Jones into an Educational Center, DCPS transferred the project from the USACE, for some re-designing, and for DCPS project implementation. Due to the uniqueness of this project with Public-Private Development Partnership between DCPS, Deputy Mayor of Planning and Economic Development (DMPED), and Northwest One Developers – as part of the City’s “New Communities” initiative, the project is in the process of transferring to DMPED for design completion and construction implementation.

**B. *Cardozo Senior High School***

<b>Current Budget Authority:</b>	\$76,560,000
(Original 2002 budget):	\$50,919,000
(Reduced 2006 budget):	\$36,423,000

**Scheduled Completion Date:** December, 2009

**Project Team:** Project Manager: DCPS  
Architect: Bowie-Gridley  
Contractor: TBD  
OPEFM Interim PM: Greg Sarau

**District Ward:** 1

**Budget Status:** Design remains to be completed and costs estimated.

**Schedule Status:** Project experienced extensive early delays as part of DMJM generation of modernizations subjected to change in Board of Education funding policy, due to funding constraints.

**Project History:** The project was delayed due to changes in the Board of Education's policy in funding modernizations. In the Transitional Capital Improvement Plan (FY 2006) the project was scaled back to a Systemic Rehabilitation Project. Under the revised 2006 Master Facilities Plan and the School Modernization Act of 2006, the full modernization was restored, and the Architect was directed to complete the design for a full modernization. .



**C.     *Kramer Middle School***

**Current Budget Authority:**     \$32,120,000

**Scheduled Completion Date:**   August 2010

**Project Team:**           Architect: Grimm & Parker  
                                  Contractor: TBD

**District Ward:**           8

**Budget Status:** Design remains to be completed and costs estimated.

**Schedule Status:** Project experienced extensive early delays as part of DMJM generation of modernizations subjected to change in Board of Education funding policy, due to funding constraints.

**Project History:** The project was delayed due to changes in the Board of Education's policy in funding modernizations, due to budget constraints. In the Transitional Capital Improvement Plan (FY 2006) the project was scaled back to a Systemic Rehabilitation Project. Under the revised 2006 Master Facilities Plan and the School Modernization Act of 2006 the full modernization was restored, and the Architect was directed to complete the design for a full modernization.

**D. *MacFarland Middle School***

**Current Budget Authority:** \$36,240,000  
(Original 2002 budget): \$16,800,000

**Scheduled Completion Date:** January, 2010

**Project Team:** Architect: Samaha  
Contractor: TBD

**District Ward:** 4

**Budget Status:** Design remains to be completed and costs estimated.

**Schedule Status:** Project experienced extensive early delays as part of DMJM generation of modernizations subjected to change in Board of Education funding policy, due to funding constraints.

**Project History:** The project was delayed due to changes in the Board of Education's policy in funding modernizations, due to funding constraints. In the Transitional Capital Improvement Plan (FY 2006) the project was scaled back to a Systemic Rehabilitation Project. Under the revised 2006 Master Facilities Plan and the School Modernization Act of 2006 the full modernization was restored, and the Architect was directed to complete the design for a full modernization.

**E. *Savoy Elementary School***

**Current Budget Authority:** \$25,000,000

**Scheduled Completion Date:** August, 2009

**Project Team:** Project Manager: JFW  
Architect: Bowie Gridley  
Contractor: Gilbane  
OPEFM Interim PM: Steve Kitterman

**District Ward:** 8

**Budget Status:** A GMP is in development but there is concern it will be over budget by an undetermined amount. In addition, \$3 million in funding from the Department of Parks & Recreation which must be secured in order to avoid a funding gap.

**Schedule Status:** Project is proceeding on schedule.

**Project History:** Project initially advanced as joint venture with Thurgood Marshall Academy (a charter school) and the Department of Parks & Recreation, and the project manager is carry-over from the charter school.

**F.     *School without Walls***

**Current Budget Authority:**     \$21,420,000

**Scheduled Completion Date:**   August, 2009

**Project Team:**           Architect: Ehrenkrantz, Eckstut & Kuhn (EEK)  
                                  Contractor: Clark Education

**District Ward:**           8

**Budget Status:** Latest estimate at 80% CDs is \$1 million over budget at \$17.7 million vs \$16.7 million budgeted for hard cost.

**Schedule Status:** Project is on schedule.

**Project History:** After initial design in 2003 was determined to be over budget, project was shelved. Project was re-initiated in 2007 and the original design contract is being re-negotiated.

**G.    *Nevel Thomas Elementary School***

<b>Current Budget Authority:</b>	\$20,990,000
(Original 2002 budget):	\$10,810,000

**Scheduled Completion Date:**    August, 2010

**Project Team:**            Architect: Einhorn, Yaffee, Prescott (EYP)  
                                 Contractor: TBD

**District Ward:**            7

**Budget Status:** Design remains to be completed and costs estimated.

**Schedule Status:** Project is proceeding on current schedule.

**Project History:** Thomas ES design phase was managed by the U.S. Army Corps of Engineers. The project was advertised for bids. The lowest responsible bidder came in 40% over the Independent Government Estimate. DCPS transferred the project from the USACE, for some re-designing, and for DCPS project implementation. The project was delayed by the Board of Education funding policy change, due to budget constraints.

**Other Projects (not in DCPS Master Facilities Plan):**

**A.     *Wilson Pool***

**Current Budget Authority:**     \$33,000,000

**Scheduled Completion Date:**   Early summer, 2009

**Project Team:**           Architect: Hughes Group Architects  
                                  Contractor: TBD

**District Ward:**           3

**Budget Status:** Project is \$5 million over budget.

**Schedule Status:** Project has experienced extensive delays in commencing but is now proceeding with demolition on the current schedule. Documents are at 100% DDs and CDs are proceeding on an accelerated schedule.

**Project History:** Project experienced numerous delays getting started but is proceeding on a schedule for completion consistent with the time that has been communicated to the public.

**B.     *Roosevelt High School***

**Current Budget Authority:**     \$600,000

**Scheduled Completion Date:**   December, 2007

**Project Team:**           Architect: Design-build  
                                  Contractor: Turner Construction

**District Ward:**           4

**Budget Status:** Design remains to be completed and costs estimated.

**Schedule Status:** Project is on schedule.

**Project History:** Project is being implemented as design-build; a proposal from Turner is being awaited.

### **C) Master Facilities Plan**

OPEFM has completed an initial review of the Master Facilities Plan (MFP) and established a schedule for its revision. In general, we find the MFP is a thorough and thoughtful plan that was developed in a relatively short period of time. It does well to mesh mission driven decisions and academic policy and incorporate them into a facilities plan. Specific recommendations are presented for each school, including special education and DCPS administrative spaces. At the same time, the document should be considered nothing more than a planning document that lacks the requisite detail in schedule, scope of work, and cost estimating for actual implementation. It is a useful document to build from as recommendations and assumptions are verified and / or refined with the actual implementation process. Additionally, the principal consultant and author of the plan, Fanning Howey has exhibited a thorough knowledge of the plan and a high level of competence that should be utilized as further planning work moves forward.

Following are a series of primary observations regarding the plan that should inform how the document is dealt with in the short term and what steps are necessary before implementation.

#### **Cost Estimating / Budgeting**

- All cost estimates were quoted in 2006 dollars and were not inflated in the 10-year capital improvement plan.
- Cost estimates were based upon a per square foot cost number that was applied to every school and adjusted by the building enrollment. It remains unclear how the enrollment is a factor in the construction cost.
- None of the modernization cost estimates were based upon specific scopes of work for each school.
- All schools built before 1945 were considered historic and were identified for modernization by default. At the same time, DCPS and Fanning Howey admit that the term “modernization” for these schools is misleading as it may include the construction of an entirely new building behind an existing portico or a sensitive rehabilitation. The varying scopes of potential work compromise the integrity of the cost estimates.

#### **Enrollment Projections**

- While a demographic analysis was completed, enrollment projections are based upon the District’s stated goal of adding 100,000 residents.
- After 14 years of declining enrollment, the projections include 15 years of constant and positive growth.



### **Plan Shelf Life**

- When the plan was developed, it was anticipated that it would be revisited and updated every two years. The plan is already two years old.
- Additionally, the plan was developed only after the completion of the Master Education Plan, which is also due for refinement. The MEP has a direct impact on the MFP and any changes to the MEP need to be incorporated. The timing may be right for DCPS Chancellor Michelle Rhee to contribute to the MEP and revise the MFP accordingly.

### **Scheduling**

- The recommended implementation schedule is reflected in the CIP, which is currently behind schedule.
- Projects now behind schedule are threatening other projects that while they could be advancing are being delayed because promises were made regarding X school opening before Y school.
- Cursory and consistent assumptions have been made regarding design and construction timelines for each of the schools. Varying scopes of actual work will impact the costs but also the construction timelines. The schedule will require additional timing details.
- The schedule also does not anticipate any particular method of delivery.

### **Consensus**

- Other than approval of the plan by the former school board, no consensus has been built around the plan's recommendations.
- A certain amount of leg work must be completed before any project involving a change to a school's academic program, consolidation, or swing space can be implemented.

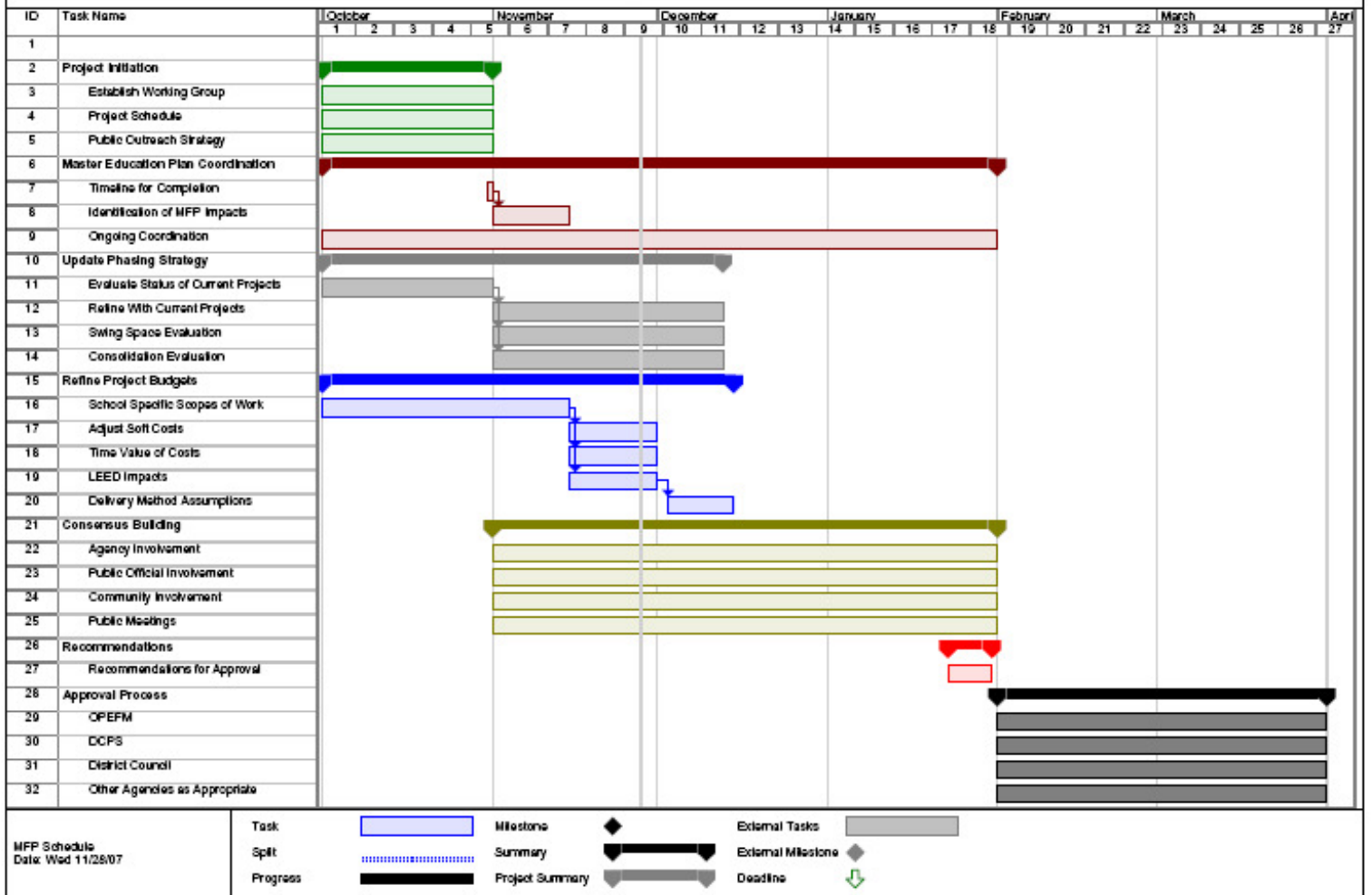
The MFP is a planning document that will require constant refinement and updating as specific feasibility studies for each school are completed. The document is useful in strategizing about the phasing of schools and the manipulation of space but less useful as a reliable source for schedule and cost estimating information.

### **Schedule for Revision**

OPEFM has outlined a process for public outreach, review, and revision to the MFP prior to submission to the Council, as outlined in the schedule below.

# OFFICE OF PUBLIC EDUCATION FACILITIES MODERNIZATION

Proposed Master Facility Plan Review Process - **DRAFT**



OFFICE OF PUBLIC EDUCATION FACILITIES MODERNIZATION  
Current and Recent Project Status Summary: Ward 1 Schools  
11/1/2007

Name	Address	Principal	Phone	Work	Current or Recent OPEFM Work
<b>Elementary Schools</b>					
Adams	2020 19th Street, N.W.	Dr. Pedro A. Cartagena	202-673-7311	Summer Blitz	DC Summer Blitz: Interior - lighting, plaster repair, painting, white boards, painting , flooring, service HVAC, ADA restroom compliant work, replace exist ac units. 100% Complete. Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Bancroft	1755 Newton Street, N.W.	Fay Thompson	202-673-7280	Targeted Repair	Targeted Repair: Light ballast replacements, reseal skylights, boiler circulating pump replacements, boiler burner calibration, ventilator fans, radiator control valves/steam traps. All DCPS work order items through June 7, 2007. 70% Complete. Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Bruce-Monroe	3012 Georgia Ave., N.W.	Marta Palacios, Ed.D	202-576-6215	Targeted Repair	Drywall & clg repairs, paint, door hw repair, select carpet replacement, classroom painting, HVAC filter replacements, plumbing fixture & flush valve replacement, water cooler repairs, lighting and power repairs, AHU & boiler repair, drain snake. 80% Complete. Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Cooke, H.D.	2525 17th Street, N.W.	Rosayln Rice-Harris	202-671-1788	FY' 07 Construction Projects	Project experienced extensive early delays as part of DMJM generation of modernizations subjected to change in Board of Education funding policy, due to funding constraints. Project was re-initiated in 2007 and is proceeding on schedule. Scheduled Completion Date: Originally 2004, revised to August 2009
Gage-Eckington	2025 3rd Street, N.W.	Richard Rogers	202-673-7305	Targeted Repair	boiler controls and burners, painting, reglazing of windows, light ballasts, exterior lighting, drain snakes, roof repairs, door adjustments, graffiti, asphalt paving, door hw, plumbing fixtures & flush valves, gwb & act, floor tile, HVAC repair. 70% Complete. Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Meyer	2501 11th Street, N.W.	Shirley W. Jones	202-673-7259	Targeted Repair	Ceiling tile, boiler controls and burners, paint, light ballasts, window reglazing, drain snakes, roof repairs, doors, window A/C, toilet partitions, graffiti, exhaust fans, plumbing fixture and flush valve repair. All DCPS work order items through June 7, 2007. 85% Complete. Anticipated Completion Date 12/31/2007. Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Park View	3560 Warder Street, N.W.	Charles H. Harden Jr.	202-576-6222	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Reed, Marie	2200 Champlain Street, N.W.	Dayo Akinsheye	202-673-7308	Targeted Repair	Flooring replacement, generator troubleshooting, exterior lighting, water coolers, sump pumps, light fixture replacements. All DCPS work order items through June 7, 2007. 65% complete. Anticipated completion date 12/31/2007. Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Tubman	3101 13th Street, N.W.	Sharon Bovell	202-673-7285	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
<b>Middle Schools</b>					
Garnet-Patterson	2001 10th Street, N.W.	Veda C. Usilton, Ph.D.	202-673-7329	Summer Blitz	DC Summer Blitz: Plumbing, paint, chalkboard resurfacing, lighting, leak repairs, ADA restroom compliance work, air conditioning (window units), and bleacher repair. 99% complete. Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is complete (distribution). All DCPS work order items through June 7, 2007. 85 % Complete. Anticipated Completion date 12/31/2007
Lincoln	3101 16th Street, N.W.	Lydia Blozquez	202-939-6680	Heating Bliz	***See Bell***
<b>High Schools</b>					
Banneker	800 Euclid Street, N.W.	Anita M. Berger	202- 673-7322	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Bell - Multicultural SHS	3145 Hiatt Place, N.W.	Maria Tukeva	202-939-7700	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Cardozo	1300 Clifton Street, N.W.	Gwendolyn Grant	202-673-7385	FY' 08 Modernization Project	Project experienced extensive early delays as part of DMJM generation of modernizations subjected to change in Board of Education funding policy, due to funding constraints. Scheduled Completion Date: December, 2009
<b>Other</b>					
Lewis	N/A	N/A	N/A	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Harrison	N/A	N/A	N/A	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).

**OFFICE OF PUBLIC EDUCATION FACILITIES MODERNIZATION**  
**Current and Recent Project Status Summary: WARD 2 SCHOOLS**  
11/1/2007

Name	Address	Principal	Phone	Work	Current or Recent OPEFM Work
<b>Elementary Schools</b>					
Garrison	1200 S Street, N.W.	Geneva B. Williams	202-673-7263	Targeted Repair	Boiler service and repair, plumbing fixture replacement and leak repairs, power repairs, AC units, exterior lighting, exhaust fans, HM doors/frames/hw, window guards. All DCPS work order items through June 7, 2007. 80% Complete. Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Hyde	3219 O Street, N.W.	Dana Nerenberg	202-282-0170	Summer Blitz	Plaster repair, painting, floor replacement, caulk windows, restroom ADA compliant, door and hardware. 100% Completed. Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Montgomery	421 P Street, N.W.	Melissa Martin	202-673-7245	Targeted Repair	Plumbing repairs, boiler heating repairs, rekeying locksets, water heater repair. All DCPS work order items through June 7, 2007 60% Completed. Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Ross	1730 R Street, N.W.	Ximena Hartsock	202-673-7200	Summer Blitz	Plaster repair, painting, exterior water fountain, ac units, and flooring. 100% Complete. Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is wrapping up. (distribution).
Seaton	1503 10th Street, N.W.	H. Douglas Rice II	202-673-7215	Targeted Repair	HVAC systems treatment, boiler circulating pump, pipe insulation, plumbing repairs, chiller service/repairs, AC units, window reglazing, door hw repair, power repairs, ceramic tile repairs, roof leak, toilet partitions, playground improvements, painting. 75% Complete. Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Stevens	1050 21st Street, N.W.	Polly Brown	202-724-4852	Summer Blitz	Painting, patching walls and ceilings. 100% Complete. Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Thomson	1200 L Street, N.W.	Gladys Camp	202-442-8664	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Addison Elementary School (Hyde Annex)	N/A	N/A	N/A	FY' 07 Modernization Project	Project is currently expected to finish on schedule. Scheduled Completion Date: August, 2008
<b>Middle Schools</b>					
Hardy (Gordon)	1819 35th Street, N.W.	Mr. Patrick Pope	202-698-3885	Ongoing Constrcution Project	Project is approximately 6 months behind schedule as defined by construction contract, plus 4 additional months behind as defined by planning documents (as much as 10 months behind public's expectations). Contract completion date of December, 2007 was threatened by delay claims by previous contractor, who has now been terminated for convenience. OPEFM has solicited bids for new CM and anticipates completion by August 2008.
Francis	2425 N Street, N.W.	Stephannie Crutchfield	202-724-4841	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Shaw	925 Rhode Island Avenue, N.W.	Mr. Gregory E. Thomas	202-673-7203	Targeted Repair	Repair/replace light fixtures, door/frame/hw, ac units, pipe repairs, window replacements, water coolers, power repairs, hot water heater replacement, showcase glazing replacement, swimming pool sump pump replacement, ceramic tile, fire extinguishers. 75% Complete. Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution). 75% Completed. Anticipated Completion Date 12/31/2007. 16 completed work order items are being performed by others.
<b>High Schools</b>					
Ellington	1698 35th Street, N.W.	Rory Pullens	202-282-0123	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
School Without Walls	2130 G Street, N.W.	Richard Trogisch	202-724-4889	FY' 08 Modernization Project	Project is on schedule, Scheduled Completion Date: August, 2009
<b>Other</b>					

**OFFICE OF PUBLIC EDUCATION FACILITIES MODERNIZATION**  
**Current and Recent Project Status Summary: WARD 3 SCHOOLS**  
11/1/2007

	Address	Principal	Phone	Work	Current or Recent OPEFM Work
Elementary Schools					
Eaton	3301 Lowell Street, N.W.	Dr. Jocelyn Drakeford	202-282-0103	Targeted Repair	Roof repairs, carpet, vinyl tile, classroom and corridor painting, boiler and chiller repair, plumbing fixture and valve repair, caulk, carpet, gwb and paint, fencing, ballasts & bulbs, door hw, water cooler. 65% Compete. Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution). Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).December 31, 2007 anticipated completion date.
Hearst	3950 37th Street, N.W.	Bernarda Tally	202-282-0106	Targeted Repair	Central A/C repairs, filter changes, boiler repair, plumbing fixture and valave repair, water cooler repair. 80% Complete, Anticipated Completion date December 31-2007. Phase 1 of the Heating Blitz work is completed ( boiler ), Phase 2 of the Heating Blitz is underway (distribution).
Janney	4130 Albemarle Street, N.W.	Mr. Marshall Cartland (Scott)	202-282-0110	Summer Blitz	Roof repair, painting, flooring, lighting, ceiling repairs / replacement. 100% Completed . Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Key	5001 Dana Place, N.W.	David Landeryou	202-282-3800	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Mann	4430 Newark Street, N.W.	Elizabeth C. Whisnant	202-282-0126	Summer Blitz	A/C Repairs, painting, flooring, lighting, ceiling repairs, exterior restoration work. 100% Complete Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Murch	4810 36th Street, N.W.	Carolyne Albert-Garvey	202-282-0130	Targeted Repair	Handdrail repair, drywall and plaster repair, door hardware repair, vinyl tile, painting, A/C window unit repairs, boiler & heat pump repair, light ballast & power repair, re-key, plumbing insul, plumbing fixture & flush valve repair 70% Complete. Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution). December 31-2007 anticipated completion date.
Oyster	2801 Calvert Street, N.W.	Marta Guzman	202-671-3111	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Stoddert	4001 Calvert Street, N.W.	Andriana Kalapothakos	202-282-0143	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Thomas	650 Anacostia Ave. NE	Ruth Barnes	202-724-4593	FY' 08 Construction Project	Projec is on schedule.
Lafayette	5701Broad Branch Road NW	Gail Lynn Main	202-282-0116	Targeted Repair	Hazmat abatement, drywall and ACT repairs, vinyl tile, light ballast and power repairs, carpet, exhaust fans, roof flashing, exterior wall repairs, HVAC controls and filters, painting, door hardware. 65% completed. Anticipated completion date 12-31-2007.
Middle Schools					
Deal, Alice	3815 Fort Drive, N.W.	Melissa M. Kim	202-282-0100	FY' 07 Modernization Project	Project experienced extensive early delays as part of DMJM generation of modernizations subjected to change in Board of Education funding policy, due to funding constraints, but has been proceeding on schedule since being re-initiated in 2007. Scheduled Completion Date: Originally 2006, revised to August, 2009
High Schools					
Wilson, W.	3950 Chesapeake St., N.W.	Stephen P. Tarason	202-282-0120	Upcoming Modernization Project	Project has experienced extensive delays in commencing but is now proceeding with demolition on the current schedule. Documents are at 100% DDs and CDs are proceeding on an accelerated schedule. Scheduled Completion Date: Early summer, 2009
Other					

**OFFICE OF PUBLIC EDUCATION FACILITIES MODERNIZATION**  
**Current and Recent Project Status Summary: WARD 4 SCHOOLS**  
11/1/2007

Name	Address	Principal	Phone	Work	Current or Recent OPEFM Work
<b>Elementary Schools</b>					
Barnard	430 Decatur Street, N.W.	Shirley Hopkinson	202-576-1100	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Brightwood	1300 Nicholson Street, N.W.	Wanda Fox	202-722-5670	Modernization Project Under Construction	Project will finish 4 months behind schedule, in December 2007 rather than originally anticipated August 2007, mostly as a result of a de-mobilization by the contractor in reaction to slow payment.
Clark	4501 7th Street, N.W.	Brearn Wright Jr.	202-576-6219	Targeted Repair	Asphalt paving, door hw repair. 65% completed. Anticipated completion December 31-2007. Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Lafayette	5701 Broad Branch Road, N.W.	Gail Lynn Main	202-282-0116	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
LaSalle	501 Riggs Road, N.E.	Leonard Massie	202-576-6120	Summer Blitz	Painting, plaster repair, flooring, and ceiling replacement. 100% Complete. Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Powell	1350 Upshur Street, N.W.	Lucia Vega	202-576-6247	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Raymond	915 Spring Road, N.W.	La Shada Ham	202-576-6236	Summer Blitz	Painting, window shades, plumbing, ceiling replacements, flooring, wall tile, stage curtain, misc repairs. 90% Completed.All classroom complete by 8/20/07, and balance by 8/27/07.
Rudolph	5200 2nd Street, N.W.	Carol Barbour	202-576-6186	Upcoming Modernation Project	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Shepherd	7800 14th Street, N.W.	Daniel Robinson	202-576-6140	Summer Blitz	Plaster repair, painting, ceiling tiles, exterior work (sidewalk). 98% complete. Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Truesdell	800 Ingraham Street, N.W.	Carolyn Brooks	202-576-6202	Targeted Repair	Radiator covers, repair/replace doors, plumbing fixture repair/replace, univent heating and ahu repair, replace light fixtures, water cooler replacements, power repairs. 85% completed. Anticipated completion date 12-31-2007. Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
West	1338 Farragut Street, N.W.	Sharron Stroman	202-576-6226	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Whittier	6201 5th Street, N.W.	Carmelita Walker	202-576-6156	Summer Blitz	Plumbing repairs, plaster repair, painting, electrical, painting, ac unit replacement. 60% Complete. Re-painting, electrical improvements, ceiling abatement, and exterior work after school opening.
Takoma	7010 Piney Branch Road, N.W.	Mary Grant	202-576-6127	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
<b>Middle Schools</b>					
MacFarland	4400 Iowa Avenue, N.W.	Dr. Antonia Peters	202-576-6207	FY' 08 Modernization Project	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Paul/ Charter School	5800 8th Street, N.W.	N/A	N/A		None
<b>High Schools</b>					
Coolidge	6315 5th Street, N.W.	Mr. L. Nelson Burton	202-576-6143	Targeted Repair	Univent repairs, gwb & clg repair, duct repairs, window A/C, boiler & heating unit repair, leak repair, generator troubleshooting, power repair, scoreboard repair, sump pump, light ballast, stage light repair, A/C compressors. 65 % completed. Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Roosevelt	4301 13th Street, N.W.	Dr. Benjamin Hosch	202-576-6130	FY' 07 Modernization Project	Project is on schedule. Scheduled Completion Date: December, 2007
<b>Other</b>					
Sharpe Health Special Needs School	4300 13th Street, N.W.	Deborah Williams	202-576-6161	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).



**OFFICE OF PUBLIC EDUCATION FACILITIES MODERNIZATION**  
**Current and Recent Project Status Summary: WARD 5 SCHOOLS**  
11/1/2007

Name	Address	Principal	Phone	Work	Current or Recent OPEFM Work
<b>Elementary Schools</b>					
Emery	1720 1st Street, N.E.	Mr. Ronald Taylor	202-576-6034	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Langdon	1900 Evarts Street, N.E.	Barbara Campbell	202-576-6048	Summer Blitz	Painting, plastering, painting, replace ceiling tiles, lighting replacement, flooring, window shade replacement, plumbing repair. 100% Complete. Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Noyes	2725 10th St., N.E.	Wayne Ryan	202-281-2580		None
Shaed	301 Douglas Street, N.E.	Cheryl Taylor	202-576-6052	Targeted Repair	Performing ACT ceiling repairs, door hardware repairs, classroom painting, central A/C repairs, water coolers, light ballast. 90% complete
Slowe	1401 Jackson Street, N.E.	Patricia Harris	202-576-6075	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Webb	1375 Mt. Olivet Road, N.E.	Donna Edwards	202-724-4543	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Wheatley	1299 Neal Street, N.E.	N/A	N/A	FY'07 Modernization Project	Project experienced extensive early delays as part of DMJM generation of modernizations subjected to change in Board of Education funding policy, due to funding constraints. Scheduled Completion Date: Originally 2006, revised to August, 2009
Brookland	1150 Michigan Ave., N.E.	Donna L. Pressley	202-576-6082	Targeted Repair	Plumbing repairs, carpet replacement w/VCT, hot water heater repair, plumbing pipe repair and insulation, AHU repair. 85% Completed. Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Cook, J.F.	30 P Street, N.E.	Mark H. Bickerstaff	202-673-7221	Targeted Repair	Window glazing replacements, drywall and plaster repairs, HVAC insulation, plumbing valve and fixture repairs. 80 % completed. Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Young	820 26th Street, N.E.	Linda Williams	202-724-4569	Targeted Repair	Light ballast, demountable partitions, AHU repair, plumbing repair, water coolers, doors/frames/hw, window security grates, ceiling repair, snake drains, repair gym floor, power repairs, gutter cleaning, exterior wood carpentry work. 70% completed. Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Marshall	3100 Fort Lincoln Drive, N.E.	Valorie B. Powell	202-576-6900	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Burroughs	1820 Monroe Street, N.E.	Linda Little	202-576-6039	Summer Blitz	Plaster repair, painting, floor replacement, caulk windows, restroom ADA compliant, door and hardware, electrical, exterior lighting, and parking lot paving. 100% Completed
<b>Middle Schools</b>					
Backus	5171 South Dakota Ave, N.E.	Diedre L. Neal	202-576-6110	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Browne	850 26th Street, N.E.	Keith Stephenson	202-724-4547	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Marshall	3100 Fort Lincoln Drive, N.E.	Valorie B. Powell	202-576-6900	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Hardy	1401 Brentwood Parkway, NE	Mr. Patrick Pope	202-698-3885	Modernization Project Under Construction	Temporary location.
Hamilton - Special Education	1401 Brentwood Parkway, N.E.	Brenda Petteway	202-698-3888	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
<b>High Schools</b>					
Dunbar	1301 New Jersey Ave., N.W.	Dr. Harriett Kargbo	202-673-7233	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Moore, Luke Academy	1001 Monroe Street, N.E.	Reginald Elliott	202-281-3600	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Spingarn	2500 Benning Road, N.E.	Mr.Reginald Burke	202-724-4525	Heating Blitz	Heating Plant Replacement
Washington, M.M.	27 O Street, N.W.	William Chiselom	202-673-7224	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Phelps	704 26th Street, NE	N/A	N/A	FY' 08 Modernization Project	Project is currently on schedule. Scheduled Completion Date: August 2008
<b>Other</b>					
Lee, Mamie D. - Special Education	100 Gallatin Street, N.E.	Clementine Homesly	202-635-3330	Targeted Repair	Hazmat, door hardware repairs, carpet, vinyl tile, corridor painting, central A/C repairs, heating repair, roof leak, condensation drip pan and leak repair, light ballasts and bulbs, plumbing fixture and valve repair, paint, kitchen equipment repair. 70% Complete. Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Taft - Sepcial Education Center	1800 Perry Street, N.E.	Gregory Matthews	202-576-6101	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
McKinley / Technology School	101 T Street, N.E.	Daniel Gohl	202-281-3950	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).



**OFFICE OF PUBLIC EDUCATION FACILITIES MODERNIZATION**  
**Current and Recent Project Status Summary: WARD 6 SCHOOLS**  
11/1/2007

Name	Address	Principal	Phone	Work	Current or Recent OPEFM Work
<b>Elementary Schools</b>					
Amidon	401 Eye Street, S.W.	John Goudeaux	202-724-4867	Summer Blitz	Plaster repair, painting, HVAC servicing, electrical, doors and door hardware, roof repair, ceiling tile replacement, floor replacement, blind replacement, plumbing, window pane replacement. Exterior - Repair work. 100% complete. Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Bowen	101 M Street, S.W.	Almeta Hawkins	202-724-4871	Targeted Repair	Door repairs, full painting, HVAC insulation, water coolers, light ballast and power repairs, plumbing fixture and valve repair, generator troubleshooting, fire extinguishers, water coolers, paint, window A/C units, carpet, gwb, ext lighting, door hardware. Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution). 80% completed.
Brent	330 3rd Street, S.E.	Arienne M. Clark	202-698-3363	Summer Blitz	DC Summer Blitz: Plaster repair, painting, window pane replacement, plumbing, flooring, roofing repairs, ceiling tile replacement, lighting. Exterior - repair columns. 95% Complete. Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Gibbs	500 19th Street, N.E.	Ms. Kimberly R. Davis	202-724-4573	Summer Blitz	Window pane replacement, ac unit replacement, plaster repair, paint, plumbing, ceiling tile replacement, door & door hardware, water fountain replacement, flooring. 98% Complete
Ludlow-Taylor	659 G Street, N.E.	Dr. Donald Presswood	202-698-3244	Summer Blitz	Interior and exterior painting, flooring replacement, elec enhancements for ac units, plumbing, window pane replacement, demo existing dividing partition system / replace with drywall, shades. 95 % Complete. Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Maury	1250 Constitution Avenue, N.E.	Michael A. Wilson	202-698-3838	Summer Blitz	Service HVAC units, replace ceiling tiles, plumbing, ac unit replacements, flooring, plaster repair, and painting. 100% Complete. Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Miner	601 15th Street, N.E.	Lavonne Taliaferro - Bunch	20--397-3960	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Payne	305 15th Street, S.E.	Mr. Dennis G. Homesley	202-698-3262	Summer Blitz	Painting, flooring, water fountain blitz, exterior brick pointing, plumbing fixture replacement, and roofing repair. 98% Completed. Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Peabody	425 C Street, N.E.	Brandon Eatman	202-698-3277	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Tyler	1001 G Street, S.E.	Michelle N. Pierre-Farid	202-698-3577	Targeted Repair	Water cooler and faucet replacements, thermostats, sump pump replacement, exhaust fans, repair boiler circulating pump and controls, condensate pump, PM on multi stacks, exterior lighting, new fan coil unit, bulbs. 70% completed. Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Van Ness	1150 5th Street, S.E.	N/A	N/A	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Walker-Jones	100 L Street, N.W.	Janette Johns-Gibson	202-535-1222	FY' 08 Modernization	Project is currently on schedule. Scheduled Completion Date: August, 2011
Watkins	420 12th Street, S.E.	Brandon Eatman	202-698-3355	Summer Blitz	Exterior - Brick point up, roofing repairs. Interior - ADA restroom compliant work, plumbing, doors & door hardware, patching, painting, flooring, ceiling tile replacement, restroom specialties, HVAC servicing, and lighting fixture replacement. 100% Complete. Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution). 85 % Complete
Wilson, J.O.	660 K Street, N.E.	Cheryl Warley	202-698-4733	Summer Blitz	Exterior - snake all drain lines. Interior - plaster repair, ac units, lighting, painting, floor replacement, caulk windows, restroom ADA compliant, water fountain replacement, door and hardware. 99% Complete . Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
<b>Middle Schools</b>					
Stuart-Hobson	410 E Street, N.E.	Brandon Eatman	202-698-4700	Targeted Repair	Performing roofing repairs, window reglazing, vinyl tile, classroom and corridor painting, window A/C unit repairs, lighting ballasts and power repairs. 70% completed. Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Eliot	1830 Constitution Avenue, N.E.	Andre' B. Roach	202-673-8666	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Hine	335 8th Street, S.E.	Willie Jackson	202-698-3330	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Jefferson	801 7th Street, S.W.	MenSa Maa	202-724-4881	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Terrell, R.H.	1000 1st Street, N.W.	Tanya Deskins	202-645-3740	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
<b>High Schools</b>					
Eastern	1700 East Capitol Street, N.E.	Willie Lamb	202-698-4500	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
<b>Other</b>					
Goding (Prospect) Special Education	920 F Street, N.E.	N/A	N/A	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Logan - Professional Training Center	215 G Street, N.E.	N/A	N/A	Summer Blitz	Exterior - paint doors, windows, fencing. Interior - Fire alarm system enhancements, PA enhancements, IT cabling, HVAC servicing, plumbing improvements, electrical, plaster repair, painting, flooring, whiteboards, lighting replacement, repair and replace toilet partitions. 99% Completed

**OFFICE OF PUBLIC EDUCATION FACILITIES MODERNIZATION**  
**Current and Recent Project Status Summary: WARD 7 SCHOOLS**  
11/1/2007

Name	Address	Principal	Phone	Work	Current or Recent OPEFM Work
<b>Elementary Schools</b>					
Aiton ES	533 48th PI NE, 20019	Peggy Mussenden	724-4627	Summer Blitz	Exterior window caulking, re-stripe parking lot. Interior - plaster repair, painting, floor replacement, caulk windows, electrical, lighting, plumbing, ADA compliant restrooms, repair and replace toilet partitions, door and hardware. 100% complete. Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Beers ES	3600 Alabama Ave SE, 20020	Gwendolyn Payton	645-3240	Summer Blitz	Summer Blitz - Roof repair, painting, water fountain blitz, radiator replacement, replace ceiling tiles, flooring, ac units, plumbing, lighting and doors and hardware. 100% Complete. Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Benning ES	100 41st St NE, 20019	Darwin Bobbitt	724-4586	Targeted Repair	Targeted Repair - All DCPS work orders through June 7, 2007. 75% Complete.
Burrville ES	801 Division Ave NE, 20019	Donnie Rutledge	724-4598	Targeted Repair	Targeted Repair: Door repairs, tuckpointing, gwb repairs, door hw, carpet & vinyl tile, classrm painting, drain snake, chiller & AHU repair, power repair, boiler repair, plumbing fixtures & valves, generator repair, light fixtures, bulbs & ballasts, water coolers. Work is 85% complete, will reach 100% by October 31. Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Davis ES	4430 H St SE, 20019	Joyce Thompson	645-3220	Summer Blitz	Summer Blitz - Roof repair, painting, water fountain blitz, radiator replacement, replace ceiling tiles, flooring, ac units, plumbing, lighting and doors and hardware. 100% complete. Heating Blitz work completed.
Drew ES	5600 Eads St NE, 20019	Kyle Bacon	724-4922	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
C.W. Harris ES	301 53rd St SE, 20019	Shirley Ambush	645-3188	Targeted Repair	Targeted Repair - Heating repairs, drain snakes, window reglazing, ext lighting, gwb and clg repair, painting, caulk, roof leaks, light fixture replacements. Work is 75% complete, will reach 100% by October 31.
Houston ES	1100 50th PI NE, 20019	Charlotte Whitten-Watkins	724-4622	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Kenilworth ES	1300 44th St NE, 20019	Fatima Johnson	724-4643	Summer Blitz	Summer Blitz - Exterior:patch and paint exterior con walls. Interior: painting, flooring, ceiling replacement, lighting, electrical work, plumbing. Work was 85% complete before school, flooring and lighting work continue. Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Kimball ES	3375 Minnesota Ave NE, 20019	Sheila West Miller	645-3150	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Nalle ES	219 50th St SE, 20019	Kim Ables	645-7300	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Plummer ES	4601 Texas Ave SE, 20019	Christopher F. Gray	645-3179	Summer Blitz	Summer Blitz - HVAC servicing, painting, flooring, water fountain blitz, exterior brick pointing, roofing repair, plumbing fixture replacement. Work is 100% complete. Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Randle-Highland ES	1650 30th St SE, 20020	Sheron Colston	279-4050	FY'07 Modernization Project	FY '07 Modernization - Final phase in design, scheduled for Aug '08 completion (see attached report for details)
River Terrace ES	420 34th St NE, 20019	Richard Patterson	724-4589	Summer Blitz	Summer Blitz - HVAC servicing, painting, flooring, plumbing, window pane replacement. 100% complete. Heating Blitz work completed.
Smothers ES	4400 Brooks St NE, 20019	Angela N. Morton	724-4640	Summer Blitz	Summer Blitz - AC unit replacement, plaster repair, painting, door & hardware. Work was 100% complete before school. Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Thomas ES*	650 Anacostia Ave NE, 20019	Ruth N. Barnes	724-4593	FY' 08 Modernization Project	FY '08 Modernization - In design, scheduled for 2010 completion (see attached report for details)
Winston EC (K-8)	3100 Erie St SE, 20020	Katie Jones	645-3300	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
<b>Middle Schools</b>					
Ronald H. Brown MS	4800 Meade St, NE, 20019	Darrin Slade	724-4632	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Kelly Miller MS	301 49th St NE, 20019	Sheena Tuckson	388-6870	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Merritt MS	5002 Hayes St NE, 20019	Eugene Pair	724-4618	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Sousa MS (at Shadd ES)	(Temp) 5601 E Capitol St NE, 20019	Delia Davis-Dyke	645-3155	Ongoing Construction	Under Construction Modernization - Scheduled for Dec '07 completion (see attached report for details)
<b>High Schools</b>					
H.D. Woodson SHS	5500 Eads St, NE, 20019	Gwendolyn Jones	724-4500	FY'07 Modernization Project	FY '07 Modernization - Design contract being re-initiated, scheduled for 2010 completion.

**OFFICE OF PUBLIC EDUCATION FACILITIES MODERNIZATION**  
**Current and Recent Project Status Summary: WARD 8 SCHOOLS**  
11/1/2007

Name	Address	Principal	Phone	Work	Current or Recent OPEFM Work
<b>Elementary Schools</b>					
Douglass - Transition Acad	2600 Douglass Road, S.E.	Eric Bradford	202-698-1570	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Birney	2501 Martin Luther King Jr. Ave., S.E.	LeRoy Owens	202-698-1133	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Draper	908 Wahler Place, S.E.	Sandra P. Coates	202-645-3309	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Ferebee-Hope	3999 8th Street, S.E.	Mr. C. Maurice Porter	202-645-3100	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Garfield	2435 Alabama Avenue, S.E.	Tammy Thomas	202-698-1600	Summer Blitz	Site-sidewalks, gates, exterior lighting. Bldg - painting, block work for plumb chase, lighting, plumbing, ceil tile replacement. 100% Complete. Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Green	1500 Mississippi Avenue, S.E.	Mrs. Florine Bruton	202-645-3470	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Hendley	425 Chesapeake Street, S.E.	Barbara M. Green	202-645-3450	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Ketcham	1919 15th Street, S.E.	Joyce Goche-Grimes	202-698-1122	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
King, M.L.	3200 6th Street, S.E.	Valoria Baylor	202-645-3440	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Leckie	4200 Martin Luther King Ave., S.E.	Clementine Homesley	202-645-3330	Summer Blitz	Roof repair, plaster repair, painting, flooring, window blinds, plumbing, ceiling replacements, door & door hardware, lighting, 98% Complete. Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Malcolm X	1351 Alabama Avenue, S.E.	Vaughn Kimbrough	202-645-3409	Targeted Repair	60% Completed. Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
McGogney	3400 Wheeler Road, S.E.			Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Moten	1565 Morris Road, S.E.	Charlene Quander	202-698-1144	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Orr	2200 Minnesota Ave., S.E.	M. Williams	202-645-3288	Summer Blitz	Service HVAC units, plaster repair, painting, and plumbing. 100% complete.
Patterson	4300 South Capitol Street, S.W.	Dr. Lydia Moss	202-645-3757	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Savoy	2400 Shannon Place, S.E.	Anne Evans	202-698-1515	FY' 08 Modernization Project	Project is proceeding on schedule. Scheduled Completion Date: August, 2009
Simon	401 Mississippi Avenue, S.E.	Dr. Adelaide D. Flamer, Ed. D.	202-645-3360	Summer Blitz	Exterior - repainting brick, snake sewer and drain lines. Interior - plaster repair, window pane replacement, service HVAC units, flooring, roofing repair, ac unit, lighting, ceiling tile replacement, plumbing, doors & hardware. 90% Complete. Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Stanton	2701 Naylor Road, S.E.	Norman K. Brooks	202-645-3255	Summer Blitz	Roof repairs, plaster repair, paint, ac units, electrical upgrades. 60% Complete. Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Terrell, McGogney	3301 Wheeler Road, S.E.	Tanya Deskins	202-645-3740	Upcoming Modernization Project	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Turner	3264 Stanton Road, S.E.	Marcia S. Parker	202-698-1155	Upcoming Modernization Project	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Wilkinson	2330 Pomeroy Road, S.E.	Margaret Stephens- Aliendre	202-698-1111	Targeted Repair	Ext. paving, playground equip, power repairs and light fixtures, service chiller and boiler, vct, sump pump, act, wood flr, drain snake, security system, water coolers, plumbing fixtures & flush valves, doors, AHU controls, paint & gwb. 90 % completed.
Harris, P.R.	4600 Livingston Road, S.E.	Shirley V. Ambush	202-645-3188	Targeted Repair	Fence repairs, roof repairs, painting, A/C repairs, plumbing fixtures & flush valves, drain snaking, light ballasts, power repairs, ceilings, extinguishers, doors, carpet, kitchen equip repairs, compressor repair, door & window reglazing, water coolers
<b>Middle Schools</b>					
Harris, P.R.	4600 Livingston Road, S.E.	Shirley V. Ambush	202-645-3188	Targeted Repair	Fence repairs, roof repairs, painting, A/C repairs, plumbing fixtures & flush valves, drain snaking, light ballasts, power repairs, ceilings, extinguishers, doors, carpet, kitchen equip repairs, compressor repair, door & window reglazing, water coolers. 75% Complete. Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution). 75 % completed.
Hart	601 Mississippi Avenue, SE	Willie Bennett	202-645-3420	Targeted Repair	Repair or replace unit vent motors for heating, snake drains, exterior lighting, plumbing fixture and faucet repair, vct flooring, door painting, repair or replace power outlets. 25 % completed. Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Kramer	1700 Q. Street, SE	Kenneth A. Parker	202-698-1188	FY' 08 Construction	Project experienced extensive early delays as part of DMJM generation of modernizations subjected to change in Board of Education funding policy, due to funding constraints. Scheduled Completion Date: August 2010
Johnson	1400 Bruce Place, S.E.	Sylvia Dark	202-698-1017	Targeted Repair	Painting, window hardware, power repairs, drain snakes, skylight reglazing, light ballasts, exhaust fans, exit signs, heating unit repairs, exhaust fans, carpet replacement, roof leak repairs. 70% completed. Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
<b>High Schools</b>					
Anacostia	1601 16th Street, S.E.	Dr. Ronald L. Duplessis, Sr.	202-698-2155	Upcoming Modernization Project	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
Ballou	3401 4th Street, S.E.	Karen D. Smith	202-645-3400		Security / life safety enhancements underway for egress doors. Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).
<b>Other</b>					
Douglass - Alternative Educ	2600 Douglass Road, S.E.	Eric Bradford	202-698-1570	Heating Blitz	Phase 1 of the Heating Blitz work is completed (boiler repair), Phase 2 of the Heating Blitz is underway (distribution).